Welcome to Hansoft Project Manager

Documentation for Hansoft version 8.0

Hansoft Project Manager covers a wide range of functionality. Dependent on your role, different sections may be of interest to you.

For project managers

·Read through Administration to familiarize yourself with the administrative tools

·Get an overview of Getting started with Agile planning, Task Scheduling, or Quality Assurance components

For team members, clients, and outsourcing partners

·Read through the information about Using the To do list or Reporting bugs.

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Installing, uninstalling and upgrading

Windows

Install

To install the Hansoft client on Windows, first download the executable installation file from the Hansoft website. Once you have saved the setup file on your hard-drive, double click it and follow the given

instructions.

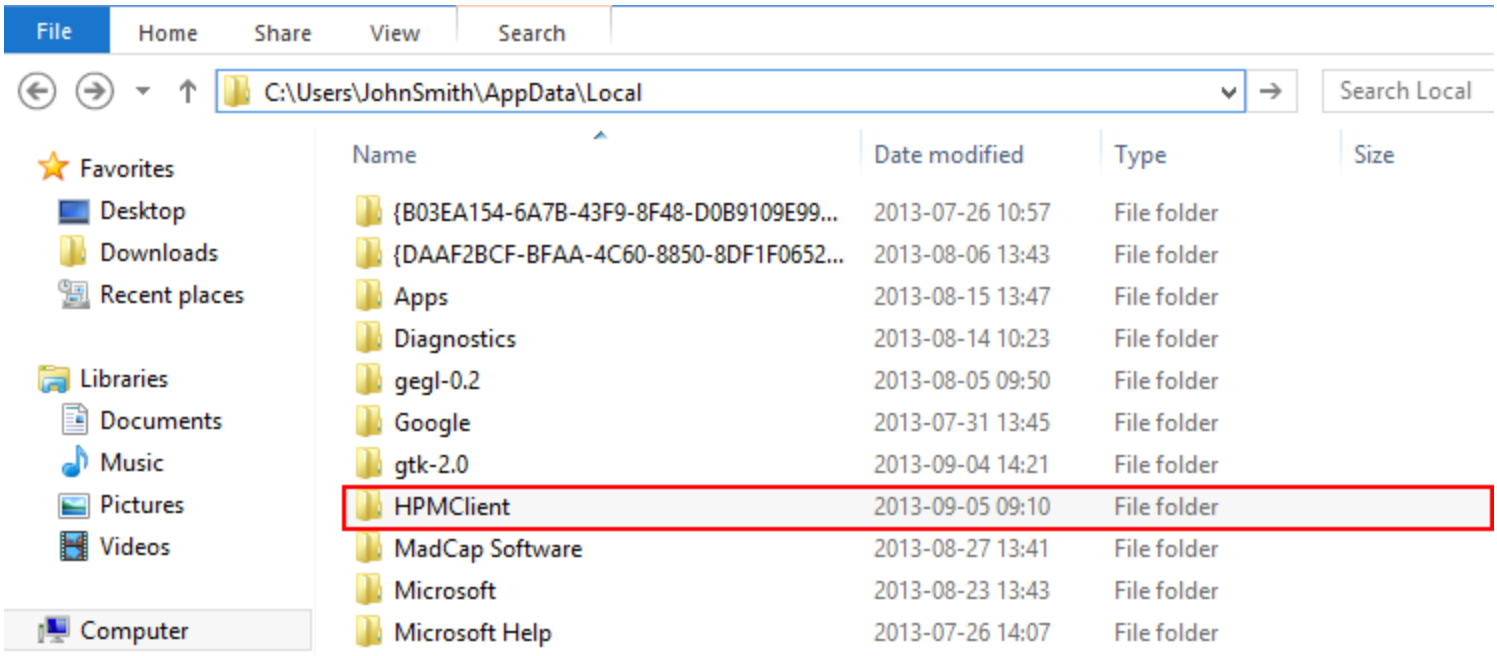
Uninstall

To uninstall the Hansoft client, navigate to the installation directory and launch the uninstaller. The Hansoft installation directory is by default located in C:\Program Files (x86)\Hansoft\Project Manager Client.

It might also be a good idea to clear your local Appdata folder from any Hansoft leftovers. You can find appata at C:\Users\"Your username"\AppData.

Find the HPMclient folder and delete it to get rid of the Hansoft remnants.

Note: This example is from Windows

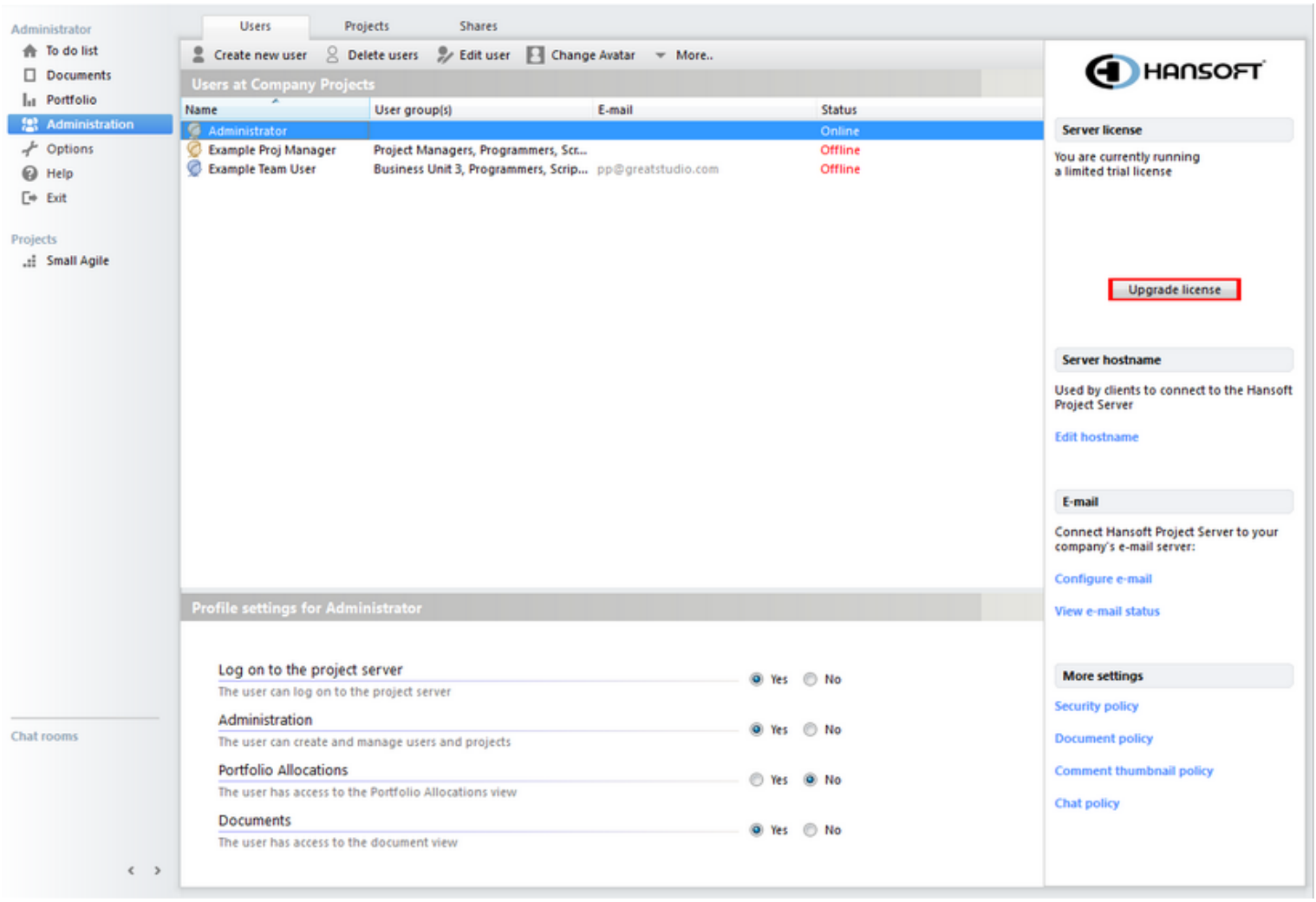


Regardless of which Windows version you are using the fastest way to find this folder is to open "Run" and insert **%appdata%**, as this will take you directly to the desired destination.

License upgrade

Once you have logged in, it is possible to upgrade your license to accommodate more users. The license upgrade is delivered via e-mail if the server is not connected to the Hansoft license server.

If you are connected to the Hansoft license server it will automatically upgrade when support@hansoft.com has been notified and confirmed its activation.


Administrator
To do list
Documents
Portfolio
Administration
Options
Help
Exit
Projects
Small Agile
Chat rooms
Users
Projects
Shares
Create new user
Delete users
Edit user
Change Avatar
More..
Users at Company Projects
Name
User group(s)
E-mail
Status
Administrator
Online
Example Proj Manager
Project Managers, Programmers, Scr...
Offline
Example Team User
Business Unit 3, Programmers, Scrip...
pp@greatstudio.com
Offline
Profile settings for Administrator
Log on to the project server
The user can log on to the project server
Yes
No
Administration
The user can create and manage users and projects
Yes
No
Portfolio Allocations
The user has access to the Portfolio Allocations view
Yes
No
Documents
The user has access to the document view
Yes
No
HANSOFT
Server license
You are currently running a limited trial license
Upgrade license
Server hostname
Used by clients to connect to the Hansoft Project Server
Edit hostname
E-mail
Connect Hansoft Project Server to your company's e-mail server:
Configure e-mail
View e-mail status
More settings
Security policy
Document policy
Comment thumbnail policy
Chat policy

Upgrade license
Upgrade license
You can upgrade your license here. Please fill in the number of additional user accounts you want your license to cover.
I want to increase my license to cover this many new accounts:
10
Support
Order upgrade
Enter license key manually
HANSOFT
Close

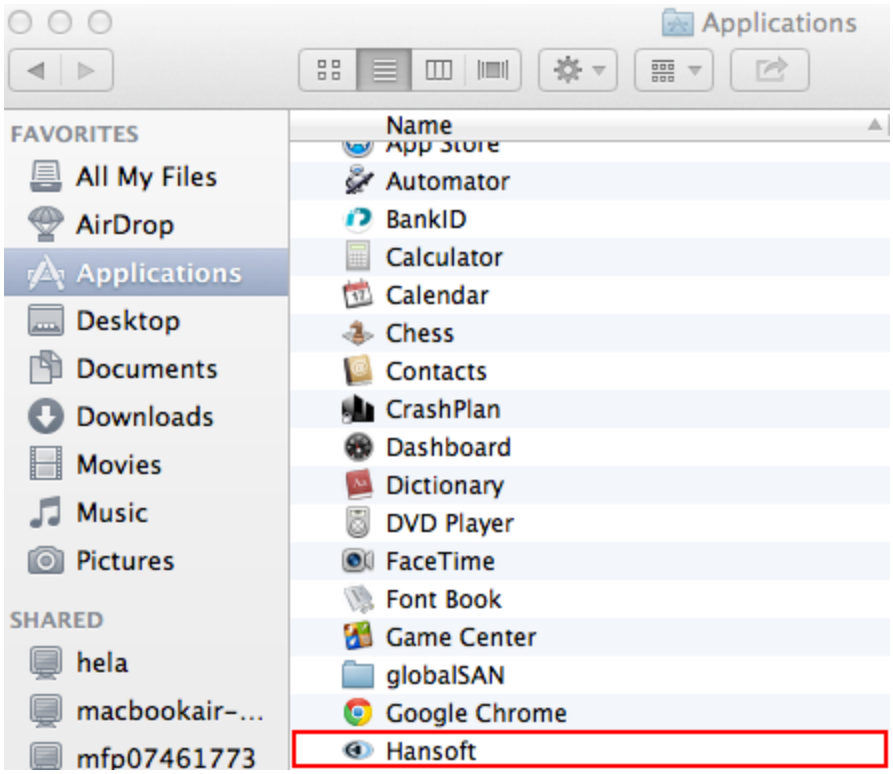
Mac OS X

Install

To install the Hansoft client on Mac OS X, first download the .dmg installation file from the Hansoft website.

Once you have saved the setup file, double click it and follow the given instructions.

Uninstall

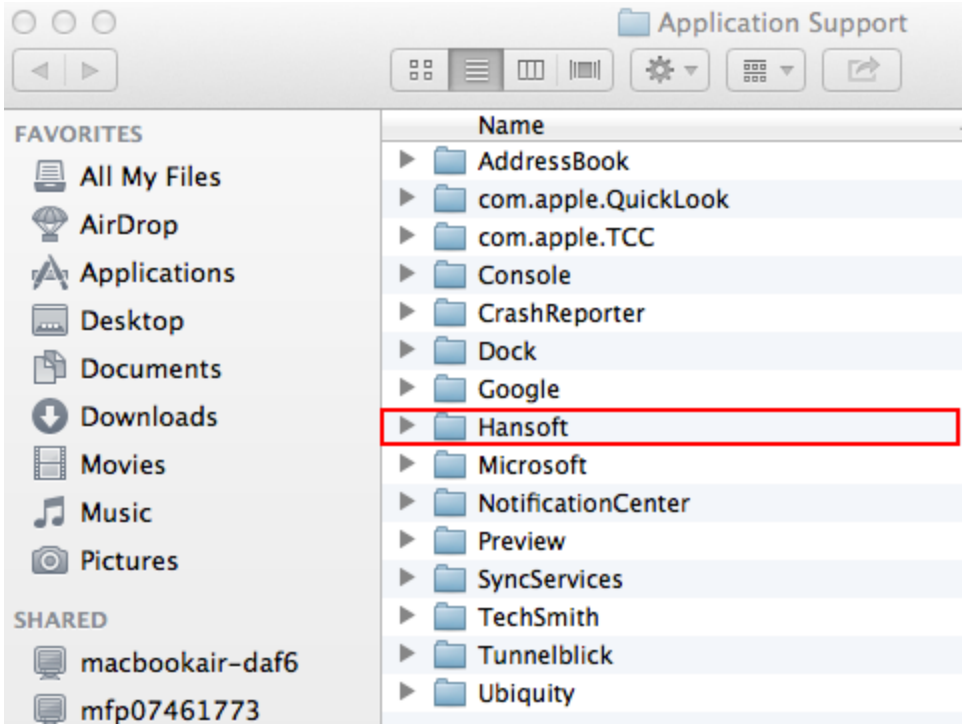


Uninstall the client by going to the "Applications" folder in Finder, right click the Hansoft icon and choose "Move to trash".

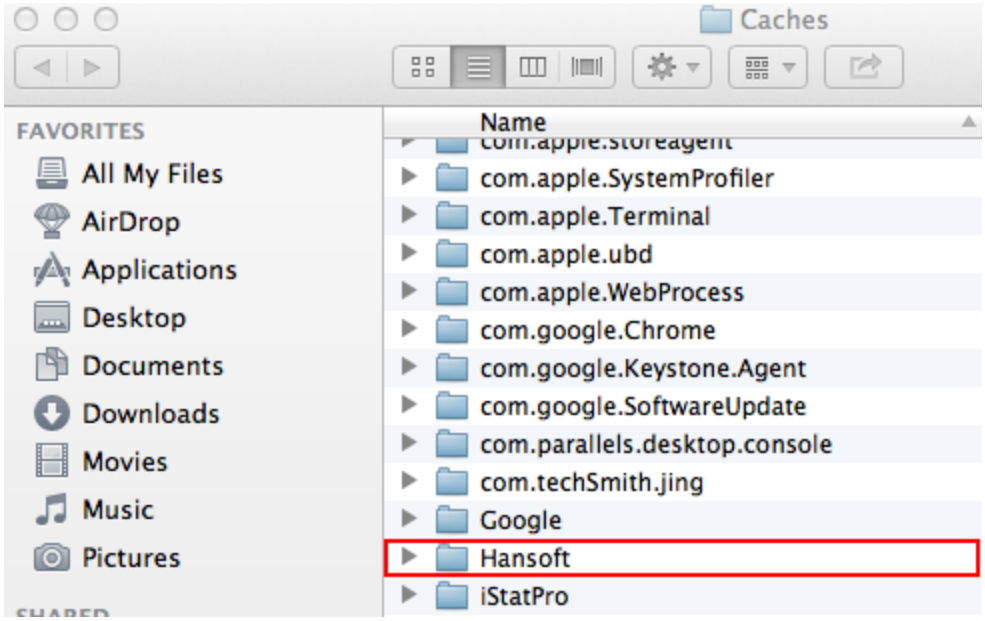
Some files need to be removed manually.

Delete the following folders: /Users/"Your username"/Library/Application Support/Hansoft and /Users/"Your username"/Library/Caches/Hansoft.

If you have trouble finding these files use "Go" and type "**~/Library/Application Support**" and "**~/Library/Caches**".



/Users/"Your username"/Library/Application Support/Hansoft



/Users/"Your username"/Library/Caches/Hansoft

License upgrade

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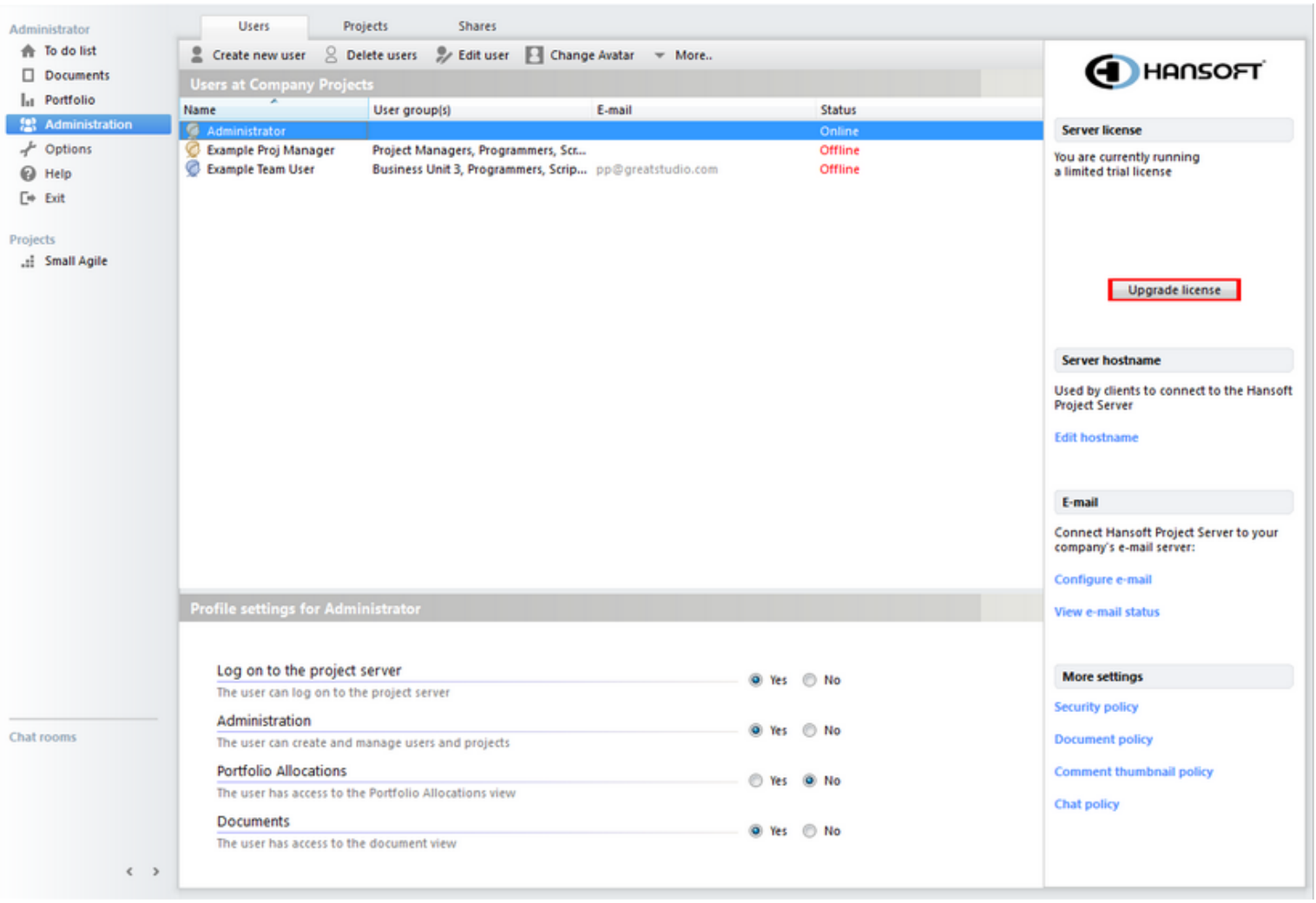
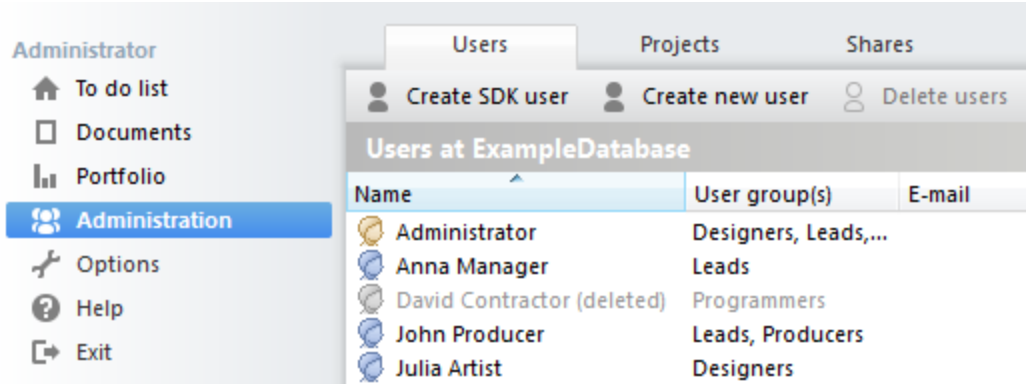


Upgrade license
Upgrade license
You can upgrade your license here. Please fill in the number of additional user accounts you want your license to cover.
I want to increase my license to cover this many new accounts:
10
Support
Order upgrade
Enter license key manually
HANSOFT
Close

Administration

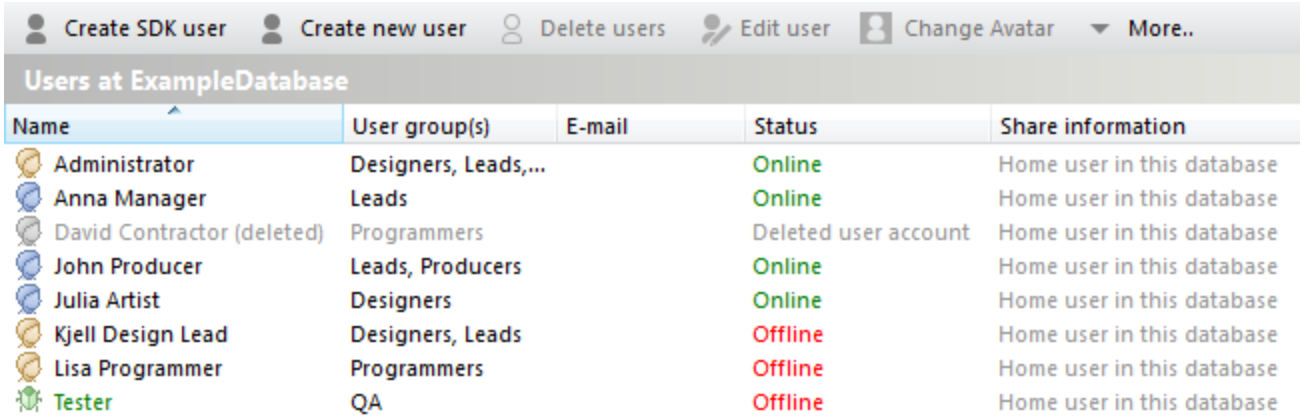
Creating and managing users

This section of the application is found under Administration in the left-hand navigation pane.



The administration section of Hansoft

The user list



The user list

The User list shows all users in the current database. In addition, deleted users who had their allocations and tasks retained will also be displayed.

·Name shows the full name of the user.

·User group(s) shows the groups that the user belongs to. Read more about allocation and user groups in the Portfolio allocations section.

·E-mail is used for automatic messages sent from the Hansoft Project Server. This is a cornerstone in a solid two-way communication between the project manager and the co-worker and for synchronization among the co-workers themselves. Read more about activation and usage of E-mail in E-mail configuration.

·Status shows if the user is currently logged on to their account.

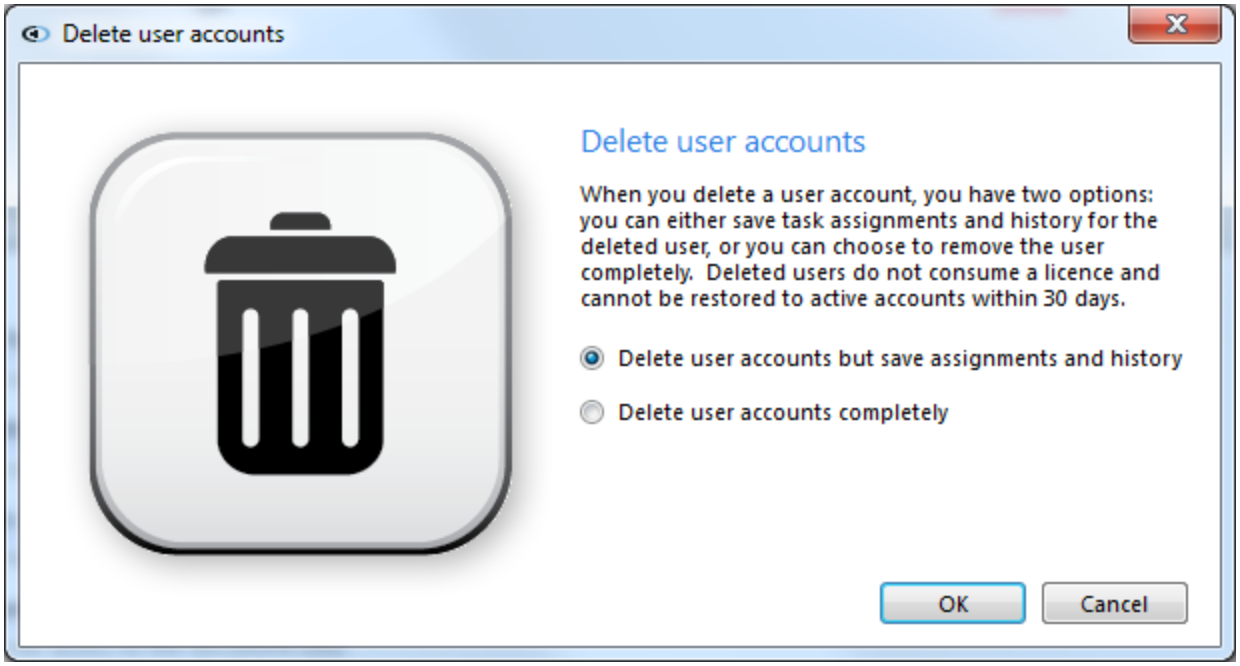
Creating a user

Create a user by clicking the **Create new user** button on the toolbar. Fill in the name and password for the user. It is also possible to set a "Sorting name" for a user account. This allows the user to be sorted after the sorting name instead of the display name. When you create a user you also create an account on the project server where your user can log on. In this account the user will find all their work planned in the To do list.

Tip 1: Name your user with his/her full personal name, for example John Smith.

Tip 2: After you have created the user, go to and configure the profile settings for your user.

Deleting a user


Delete user accounts
Delete user accounts
When you delete a user account, you have two options: you can either save task assignments and history for the deleted user, or you can choose to remove the user completely. Deleted users do not consume a licence and cannot be restored to active accounts within 30 days.
Delete user accounts but save assignments and history
Delete user accounts completely
OK
Cancel

When deleting a user, a choice can be made to retain assignments and task history. Otherwise, the user will be permanently deleted, with no option to restore them.

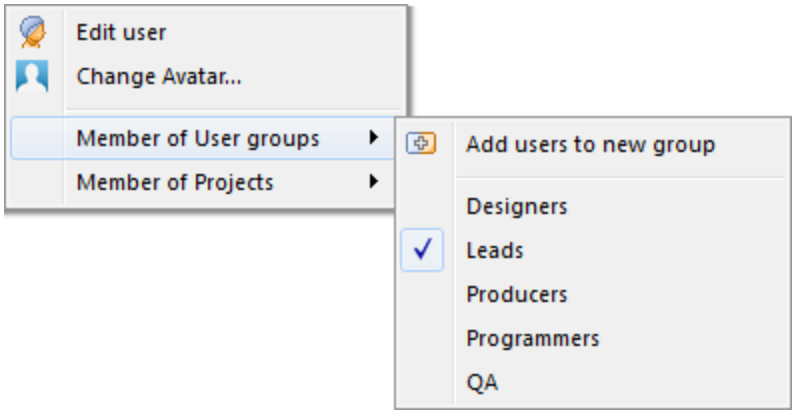
When you permanently delete a user, all references in the projects where they have planned tasks will be removed, as well as their account on the project server. This operation cannot be undone, so be careful. Additionally, be mindful of any repercussions related to the SDK, or to any integrations that might be affected.

Editing a user

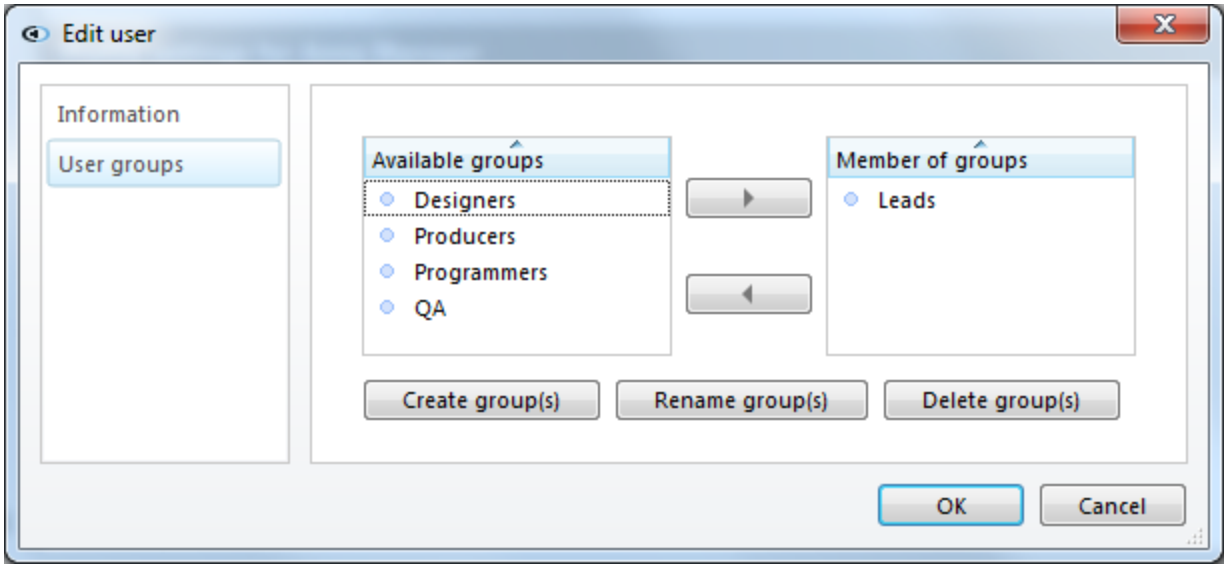
You can edit the properties of a user by clicking the **Edit user** button on the toolbar. When you change the name of the user, all references to this user in the project planning will also be updated.

Adding a user to a group

There are two ways to add users to a group: Either by right-clicking the user and selecting the groups via the "Member of User groups" menu (where you can also create a new group), or by using the "Edit user" dialog.



Adding a user to a group using the context menu



Adding a user to a group using the User groups section of the "Edit user" dialog

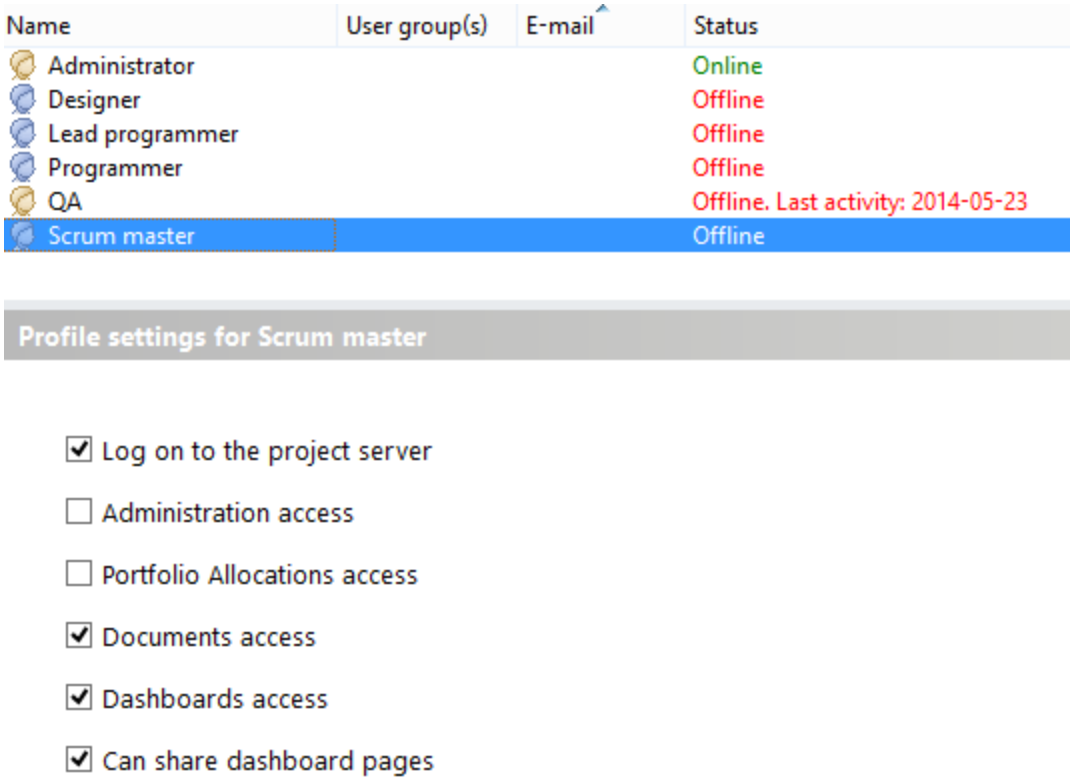
Convert ghost users

See Ghost users

QA accounts

See QA user accounts

User profiles



The profile settings section of the User administration panel

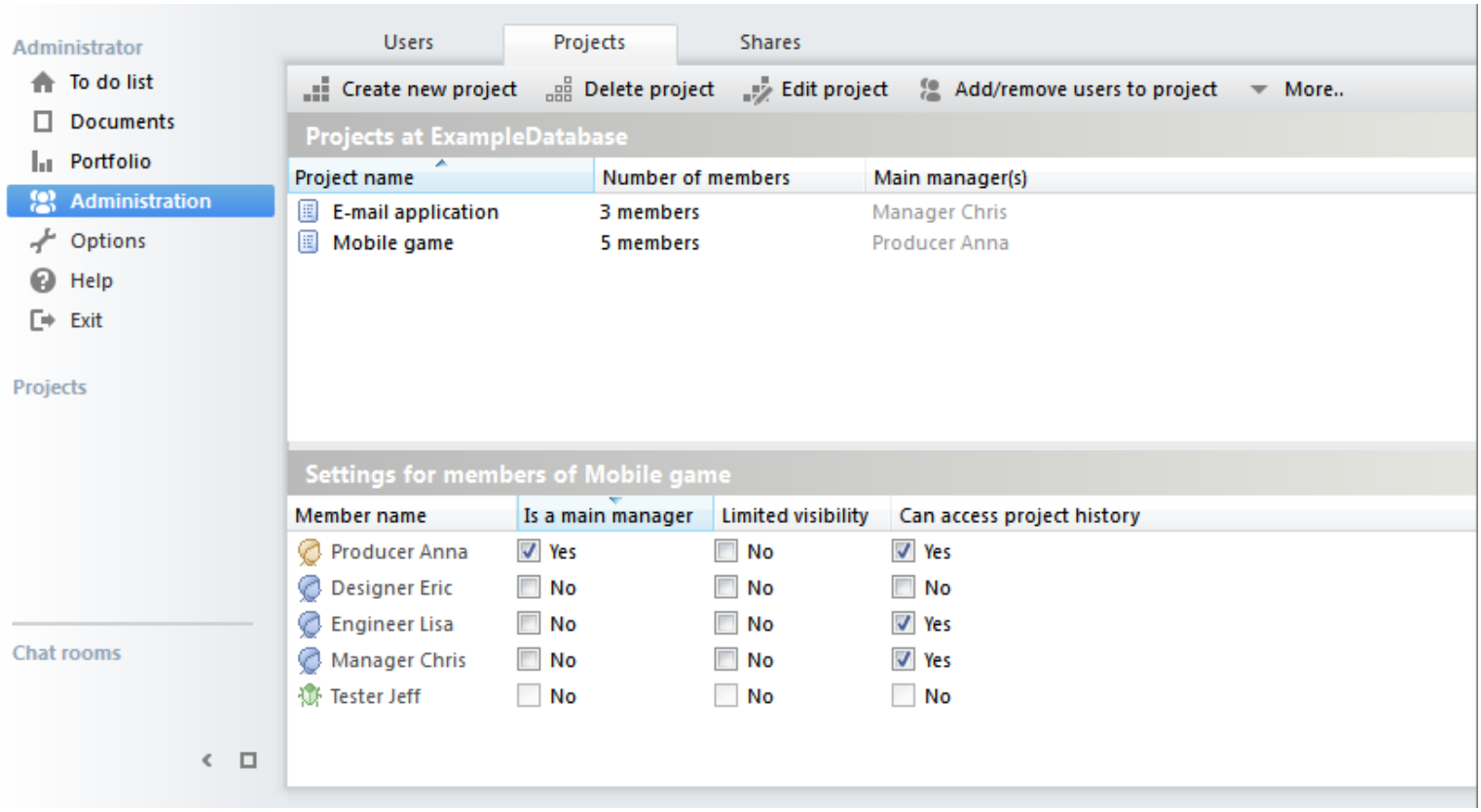
Every user can have their specific profile settings. This is a cornerstone in controlling what the employees have access to. For example, project managers normally have access to Portfolio allocations but co-workers do not.

When you change the profile setting, it has an immediate effect on the user account.

Tip: When you have finished with the profile settings for the user, proceed to create a project and add users to your project.

The list of projects

The list of projects is located below the main projects toolbar. It shows all currently existing projects.



The list consists of three columns:

·Project Name shows the full name of the project.

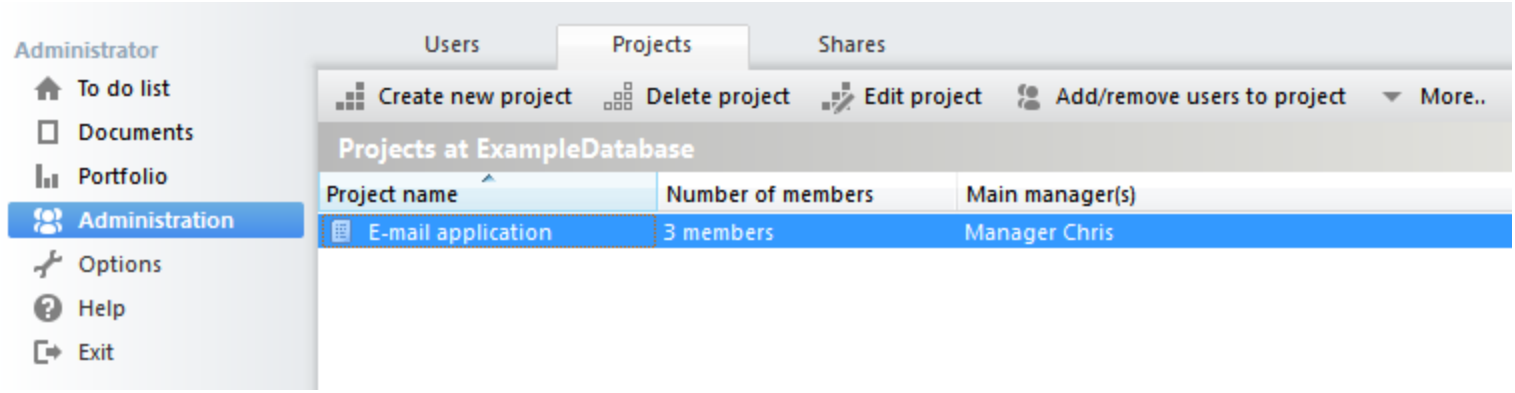
·Number of members shows the current number of users that are members of the project.

·Main manager(s) shows the current main project managers of the project.

Read more about main project managers, sub project managers and other profile settings for project managers here.

Creating and managing projects

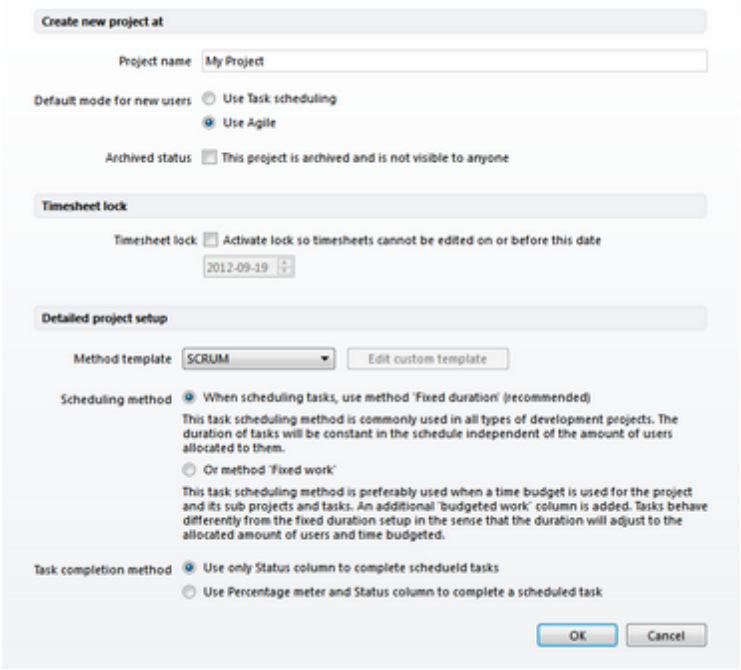
Projects are created and managed in the **Projects** tab of the Administration section of Hansoft.



The **Projects** tab in the Administration section

Creating a project

Create a project by clicking the **Create new project** button on the toolbar.


Create new project at
Project name
My Project
Default mode for new users
Use Task scheduling
Use Agile
Archived status
This project is archived and is not visible to anyone
Timesheet lock
Timesheet lock
Activate lock so timesheets cannot be edited on or before this date
2012-09-19
Detailed project setup
Method template
SCRUM
Edit custom template
Scheduling method
When scheduling tasks, use method 'Fixed duration' (recommended)
This task scheduling method is commonly used in all types of development projects. The duration of tasks will be constant in the schedule independent of the amount of users allocated to them.
Or method 'Fixed work'
This task scheduling method is preferably used when a time budget is used for the project and its sub projects and tasks. An additional 'budgeted work' column is added. Tasks behave differently from the fixed duration setup in the sense that the duration will adjust to the allocated amount of users and time budgeted.
Task completion method
Use only Status column to complete schedueld tasks
Use Percentage meter and Status column to complete a scheduled task
OK
Cancel

You can now choose between agile or task scheduling project methods as a default mode for the project. You can always switch between task scheduling and agile any time during the project life cycle.

If you have created an agile project, please chose an existing agile method template or create your own.

You can also select two different project methods with task scheduling: "Fixed work" and "Fixed duration". Select the one that suits your needs. You can read more about the differences between the method in the

Fixed duration and fixed work section of this help manual. Also select how tasks should be completed, binary (yes or no) or percentage (0-100%).

Notice: The project you have created is empty. The application will now ask you if you want to add the users you have created to the project. If you want to do that now, jump to the Add/remove users to project section of this help manual.

Deleting a project

Select the project that you would like to delete and click on the **Delete project** button on the toolbar. When you delete a project, all associated data such as tasks, releases and assigned work will be deleted permanently.

Warning: This operation cannot be undone!

Editing a project

You can change the properties of a project by clicking the **Edit project** button on the toolbar. You can change the name, mode and project method. All changes will have immediate effect on the project server and to all clients connected to it.

Archiving a project

You can archive a project by clicking the archive flag in "Edit project". Archive when you are finished with a project. It removes all information from the To Do list, main application tab, users usage, etc. When you need to access it again, just remove the archive flag and retrieve the information you want (project history, schedule etc.).

Add/remove users to project

Jump to the Add/remove users to project section of this help manual.

Project user settings

For every project, the users allocated to it each have profile settings associated with them, controlling what they can do in the project.

Profile settings in the Project administration section

Typically, a Main manager is someone who has the full access to the project and the project plan, and who delegates parts of the project to subproject managers. A main manager in Hansoft enjoys the ability to manage the resource allocation. Any number of users can be main managers.

Note: The "main manager" privilege is project specific.

With "Limited visibility" enabled (as explained in Delegation and Limited Visibility section) the user cannot access any information beyond what has been explicitly made visible to them.

Additionally, users can be set up to "access the project history".

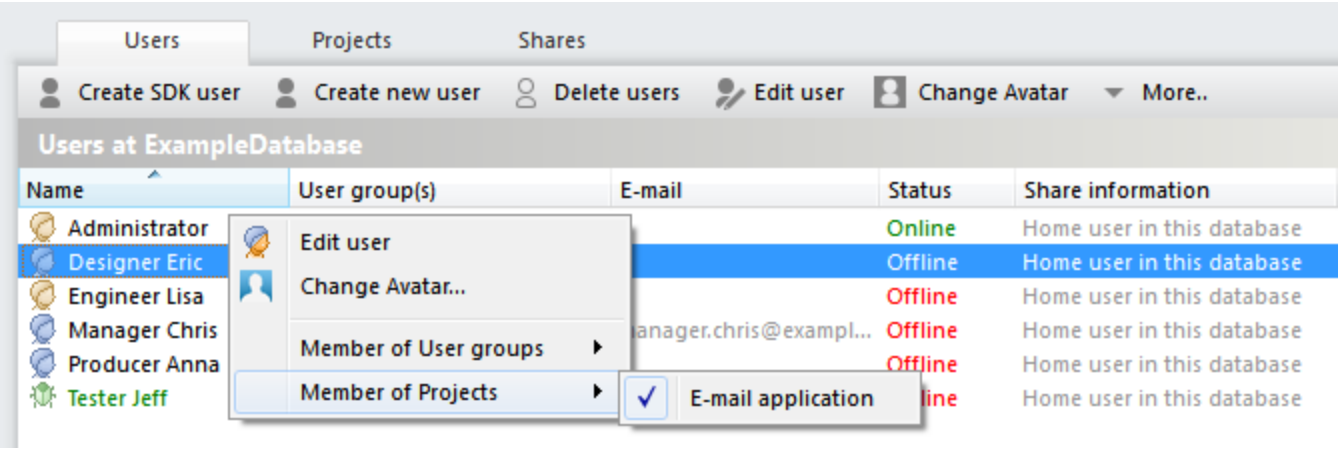
When used in conjunction, "Limited visibility" and "Can access project history" is suitable for observers who might want to evaluate the performance of a development team. They take no part in the planning, but can evaluate things like release slippage.

Tip: When you have finished configuring the profile settings for users in the project, you can proceed to make a project schedule.

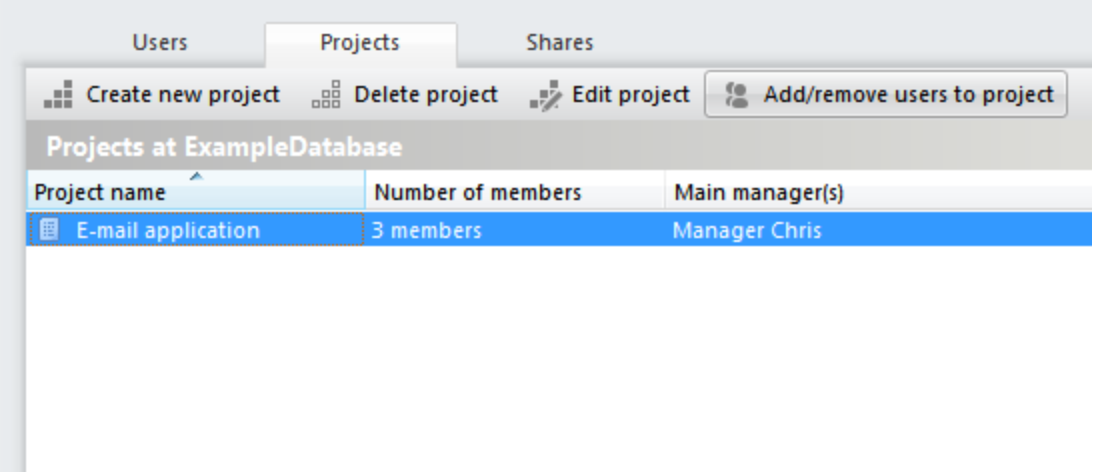
Allocating users to a project

Adding a user

Users can be added to projects either by right-clicking their name in the user list and selecting the project directly, or by assigning them in the **Projects** tab of the administration section.

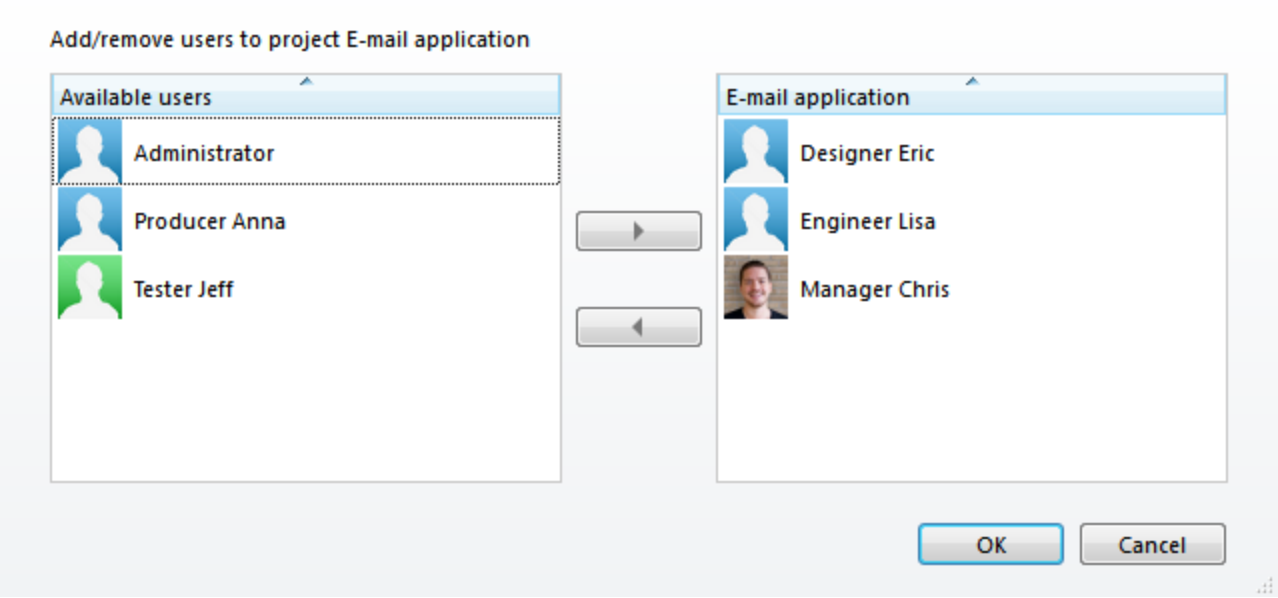


Adding a user to a project from the **Users** tab



Adding a user to a project from the **Projects** tab

Adding users can be done either by right-clicking a user in the Users tab, or by clicking the **Add / remove users to project** button in the **Projects** tab. This will show the user allocation dialog. Double-clicking a name will move it from available to allocated, or vice versa.



The user allocation dialog

Note: Users can take on different roles in different projects -- a user can be a main manager of one project, but a passive observer in another. This is determined by the project user settings. It is recommended that you review these settings after allocating a user.

Removing a user

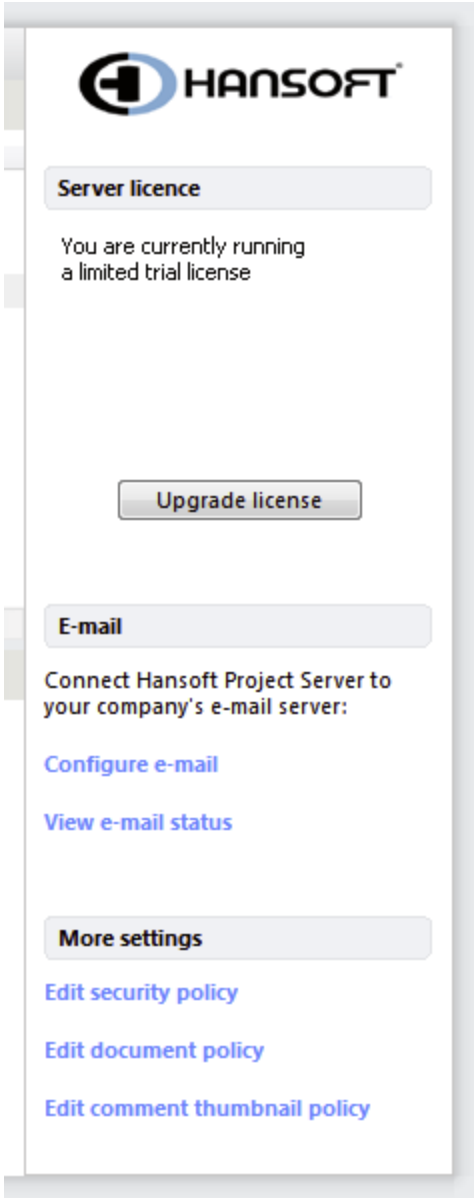
Select a user in the project in the right column and press the **Remove user** button. When you remove a user from a project, all references to the user in the project will be removed.

Warning: This operation cannot be undone!

Security policy

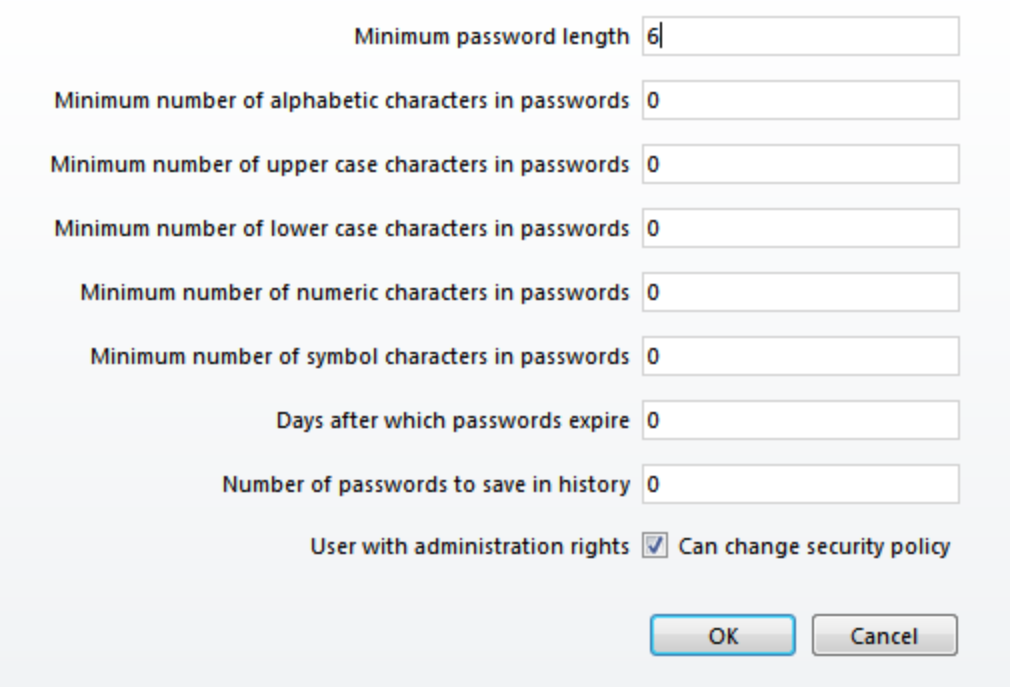
Hansoft features 256-bit AES (Advanced Encryption Standard) for communication/storage and SHA-256 for password hashing.

The general security policy is set in the Administration section, by clicking on **Edit security policy**.



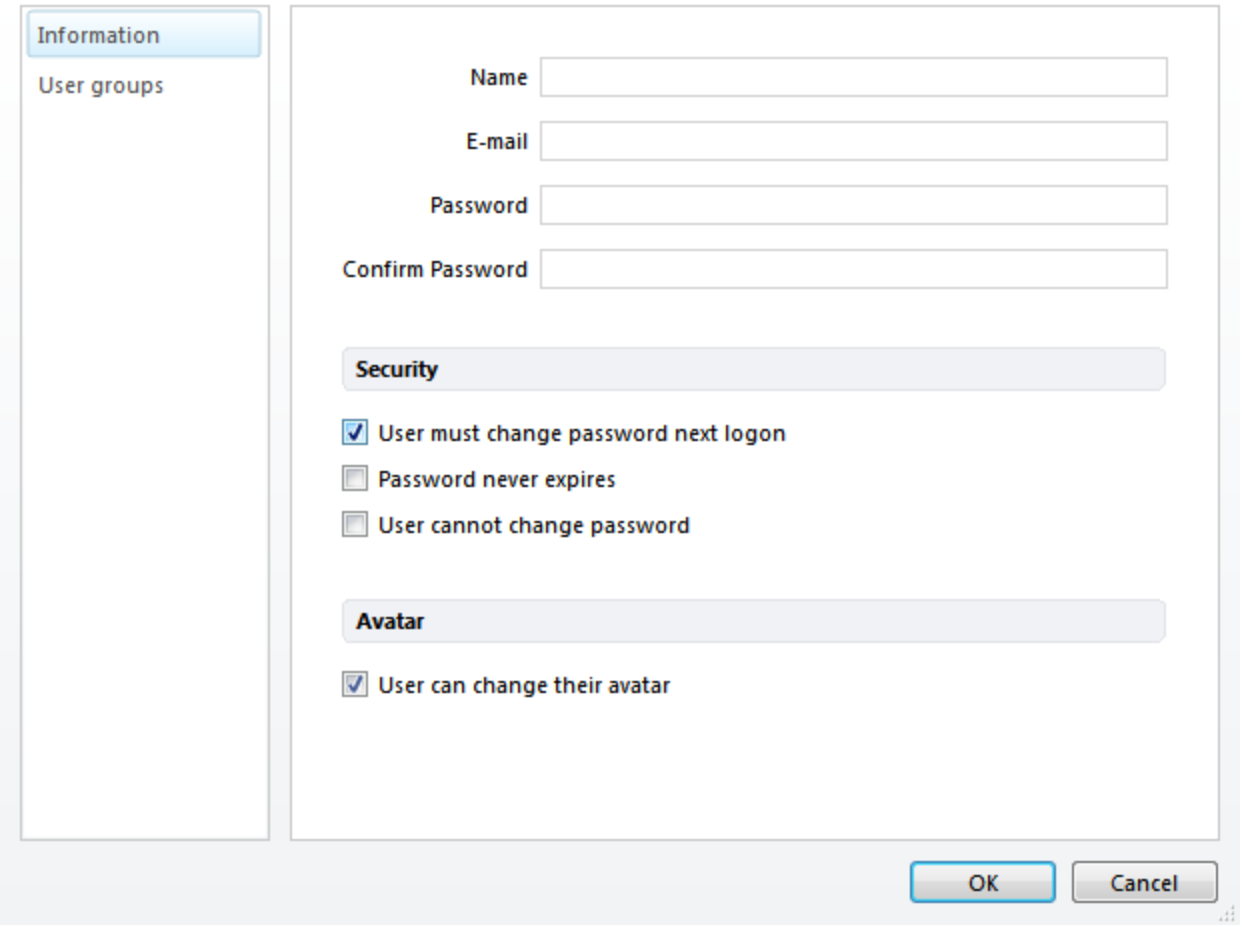
The Hansoft server license pane in the Administration section

The default "password security policy" is relatively non complex (for usability reasons) and it is recommended that you add complexity so that the password is harder to break by guessing (longer password length for example).


Minimum password length 6
Minimum number of alphabetic characters in passwords 0
Minimum number of upper case characters in passwords 0
Minimum number of lower case characters in passwords 0
Minimum number of numeric characters in passwords 0
Minimum number of symbol characters in passwords 0
Days after which passwords expire 0
Number of passwords to save in history 0
User with administration rights
Can change security policy
OK
Cancel

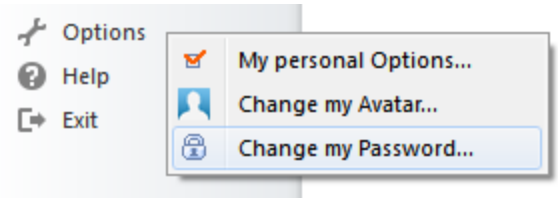
Editing the password security policy

Certain security policies can also be set on a per-user basis.



Editing a user

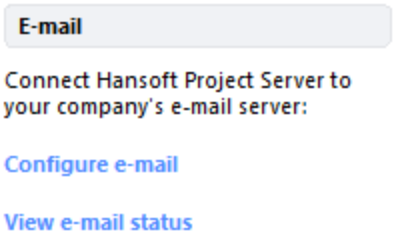
If a user can change the password, this can be achieved in his/her options menu.



The Options menu in the Hansoft navigation pane

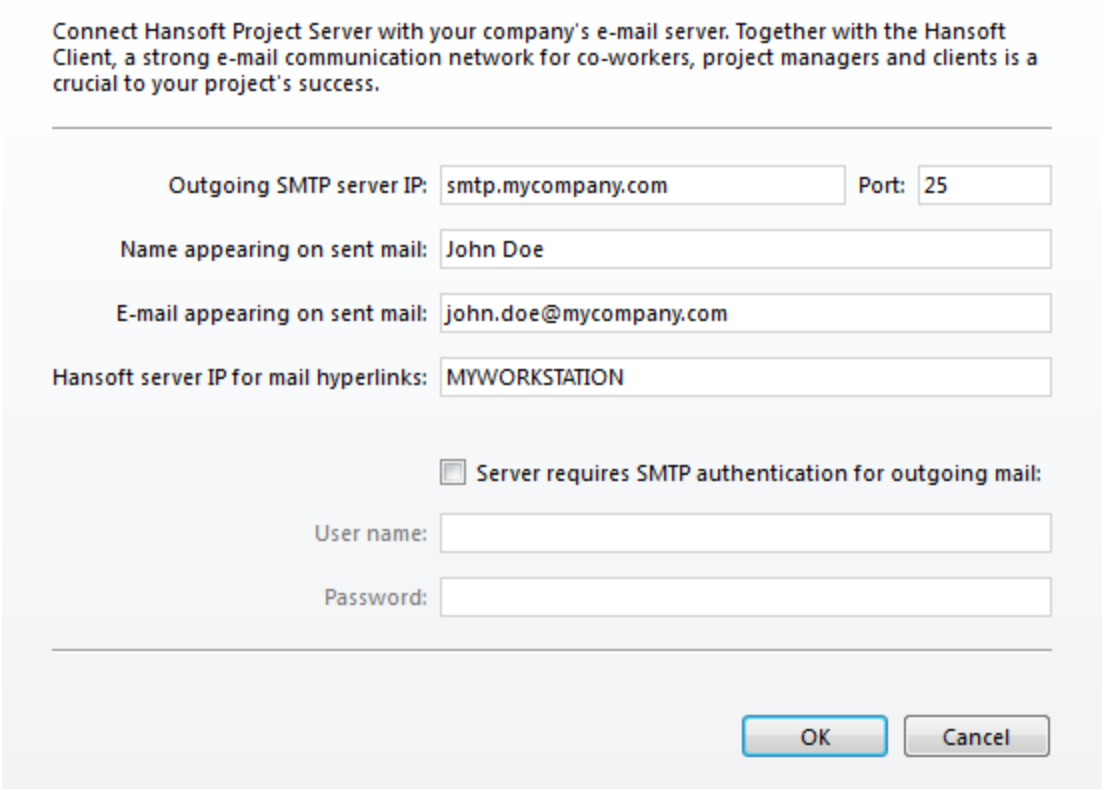
E-mail configuration

Hansoft can be configured to send an e-mail when a user's schedule is updated, before a release or when a task comment has been posted or edited. Project managers may, for example, get an e-mail when a task is completed.



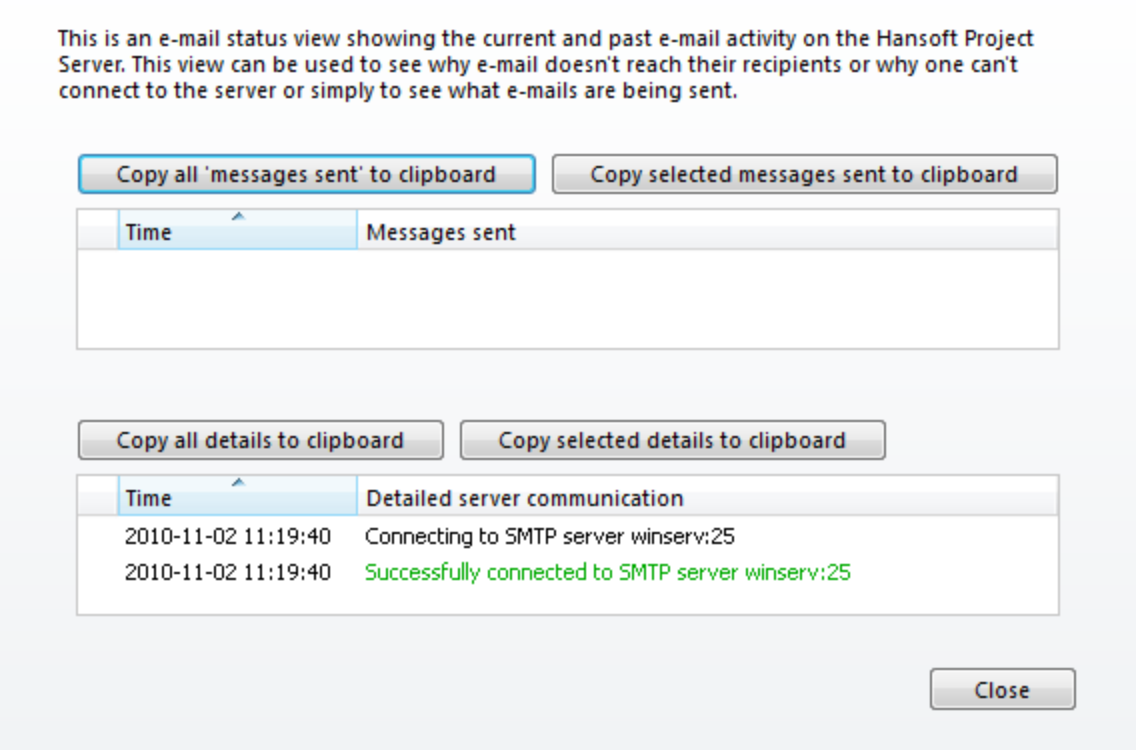
The **Configure e-mail** button

Configuring an e-mail server connection


Connect Hansoft Project Server with your company's e-mail server. Together with the Hansoft Client, a strong e-mail communication network for co-workers, project managers and clients is a crucial to your project's success.
Outgoing SMTP server IP:
smtp.mycompany.com
Port:
25
Name appearing on sent mail:
John Doe
E-mail appearing on sent mail:
john.doe@mycompany.com
Hansoft server IP for mail hyperlinks:
MYWORKSTATION
Server requires SMTP authentication for outgoing mail:
User name:
Password:
OK
Cancel

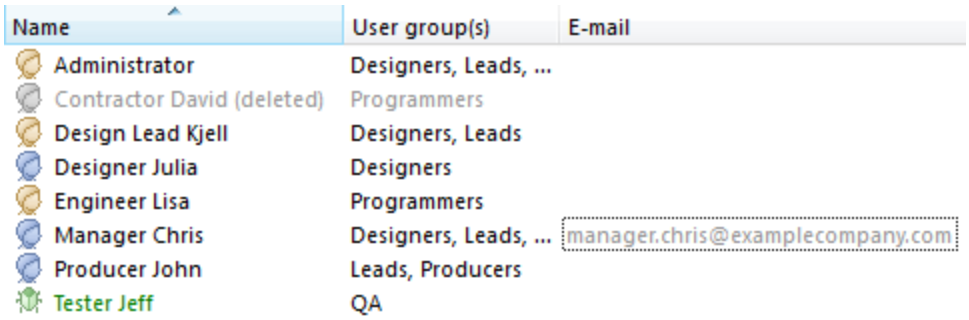
The E-mail settings dialog

The most important field in the e-mail settings dialog is "Outgoing SMTP server name". This is what enables Hansoft to send e-mails. Once filled in, it can be verified by clicking **View e-mail status** in the Administration side-panel. A successful connection includes the line "Successfully connected to SMTP server."


This is an e-mail status view showing the current and past e-mail activity on the Hansoft Project Server. This view can be used to see why e-mail doesn't reach their recipients or why one can't connect to the server or simply to see what e-mails are being sent.
Copy all 'messages sent' to clipboard
Copy selected messages sent to clipboard
Time
Messages sent
Copy all details to clipboard
Copy selected details to clipboard
Time
Detailed server communication
2010-11-02 11:19:40
Connecting to SMTP server winserv:25
2010-11-02 11:19:40
Successfully connected to SMTP server winserv:25
Close

A successful e-mail verification session

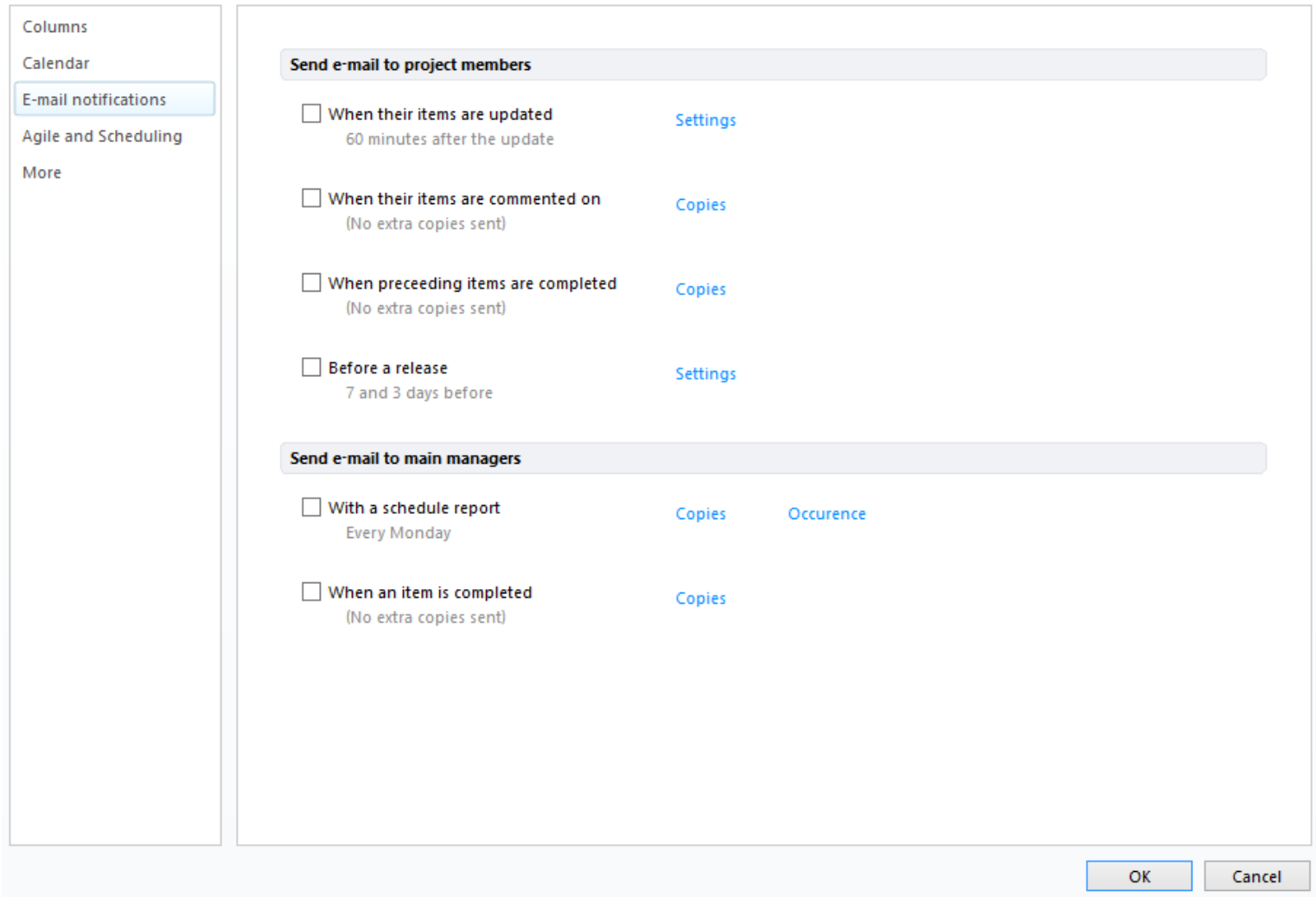
Setting user e-mail addresses



E-mail settings for users

With a valid e-mail connection set up, an administrator or a main project manager can specify e-mail addresses for users in the **Users** tab of the Administration section.

E-mail settings in projects



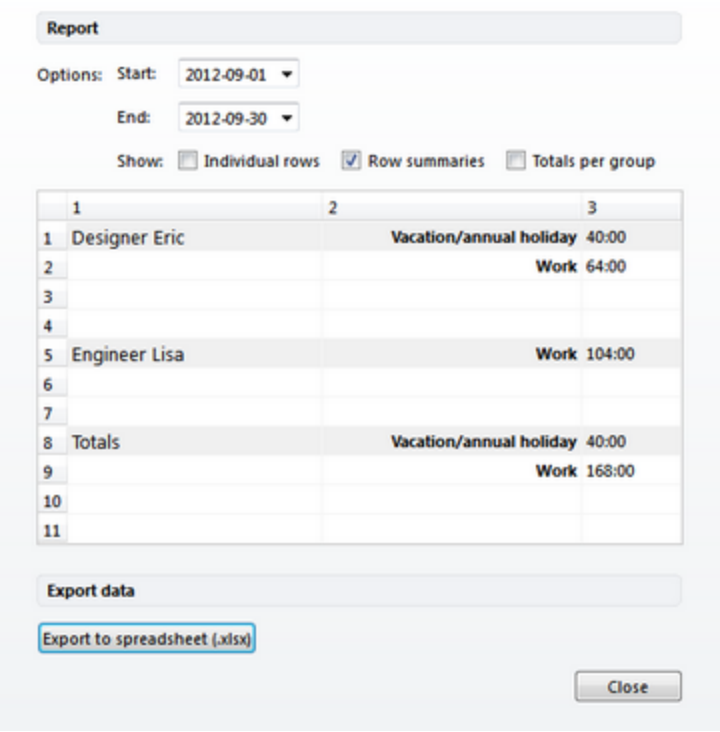
Each project (and the Quality Assurance section of each project) can have its own configuration for when and how to send e-mail.

Timesheet reports

If Hansoft is extended with the "time report module", every user has access to their individual timesheet in their "To do list". A main project manager may also generate a summary of time reports from the Administration section.

Timesheet reports

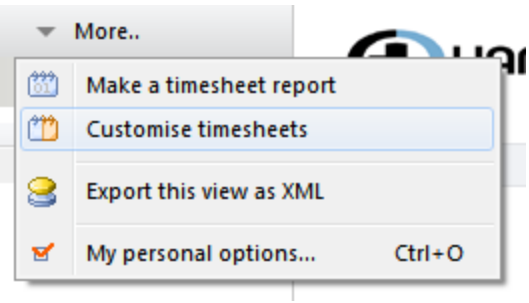
Administrators can generate a user timesheet report is by clicking on **More..>Make a timesheet report** in either the **Users** or **Projects** tabs in the Administration section. If done in the **Users** tab, a timesheet will be generated for the selected user(s). If done in the **Projects** tab, one will be generated for the selected project (s).



A project timesheet report

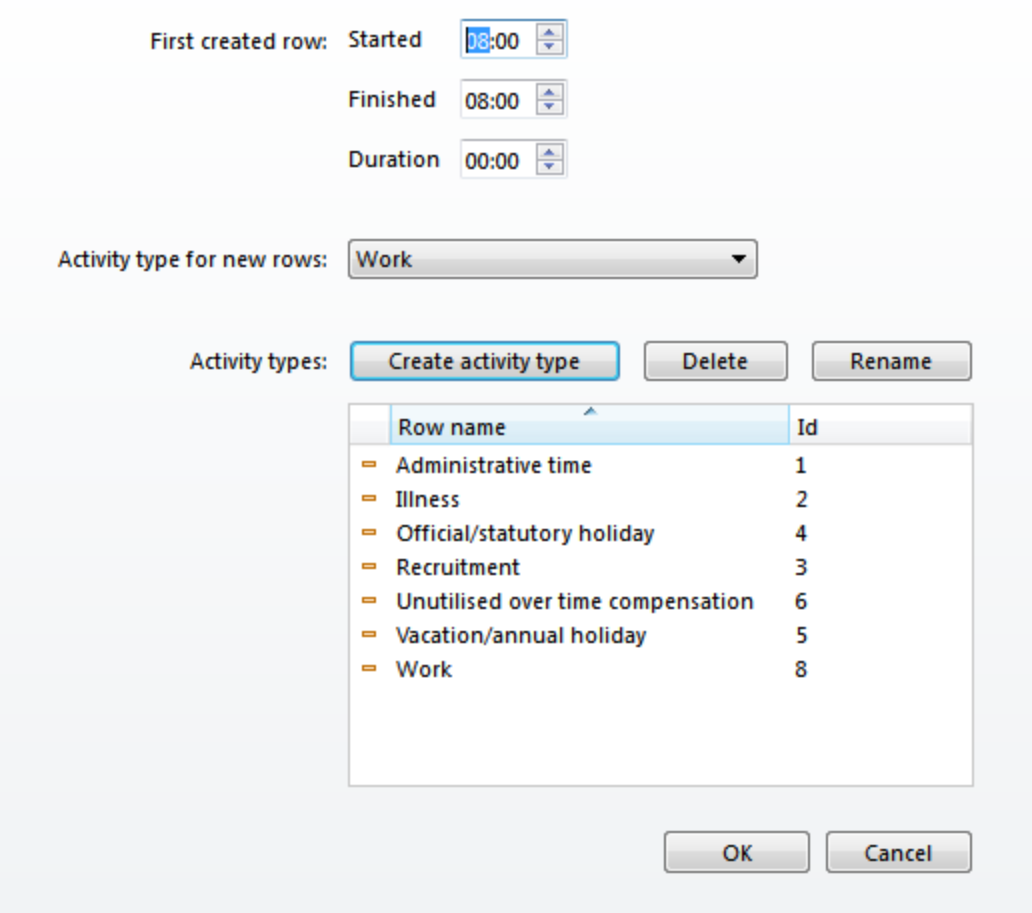
Tip: Timesheets may be locked in order to prevent data related to projects from being changed before a given date.

Customize timesheets



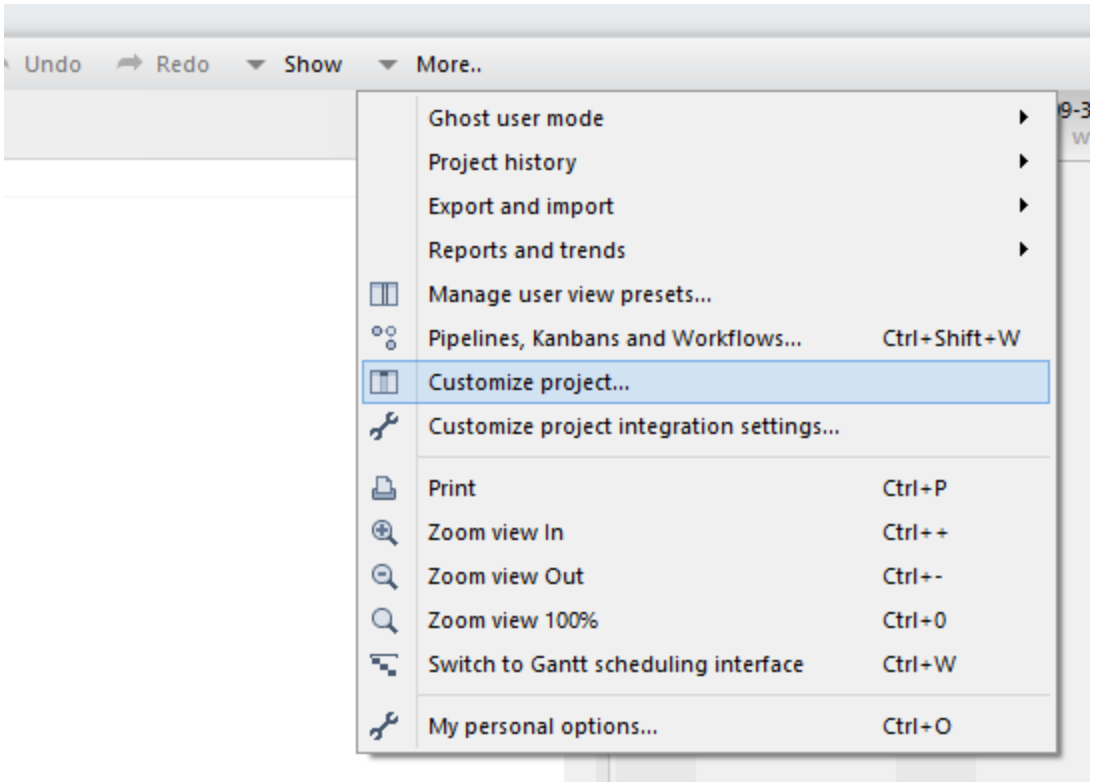
The **Customize timesheets** button

Timesheets can be customized by clicking **Customize timesheets** in either the **Users** or **Projects** tab of the Administration section. Customization includes setting default working hours and activity types for newly created rows in the timesheet editor, as well as naming and defining activity types available.

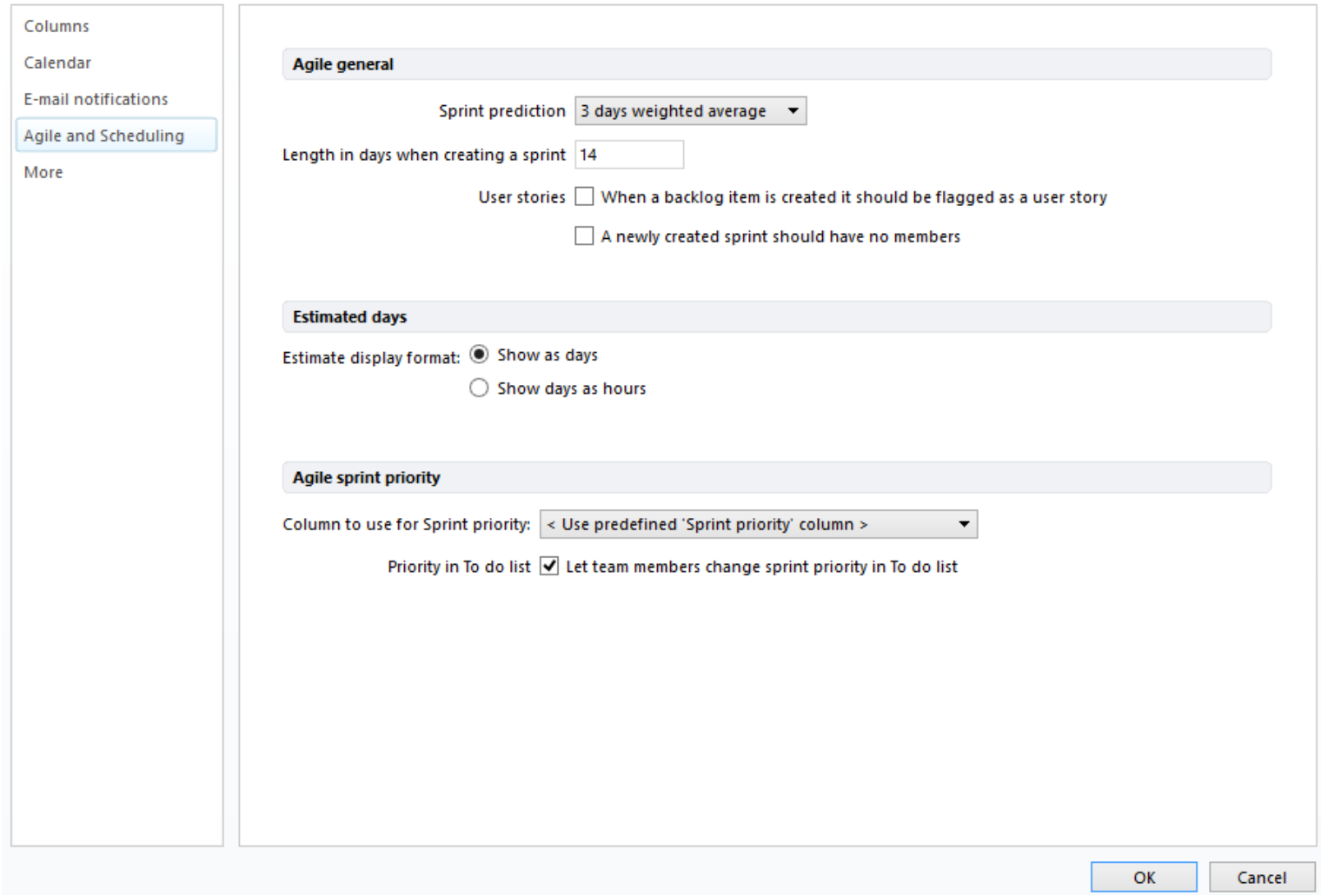


The customize timesheets dialog

Project agile and scheduling settings



More..>Customize project...



Configuring the sprint in the "Customize project..." dialog

Sprint settings

There are several settings available that configure the default behavior of sprints.

- Sprint prediction
- Default sprint length
- User stories
- Time estimating
- Item prioritizing

Agile general

Hansoft utilizes a weighted average when preforming prediction calculations for the sprint or release burndown. The number of days included in the calculation of the weighted average can be adjusted in

More..>Customize project...>Agile and Scheduling. A more detailed description of the Hansoft burndown prediction can be found here.

With "When a backlog item is created it should be flagged as a user story" enabled a notifier will appear next to the item name indicating a user story.

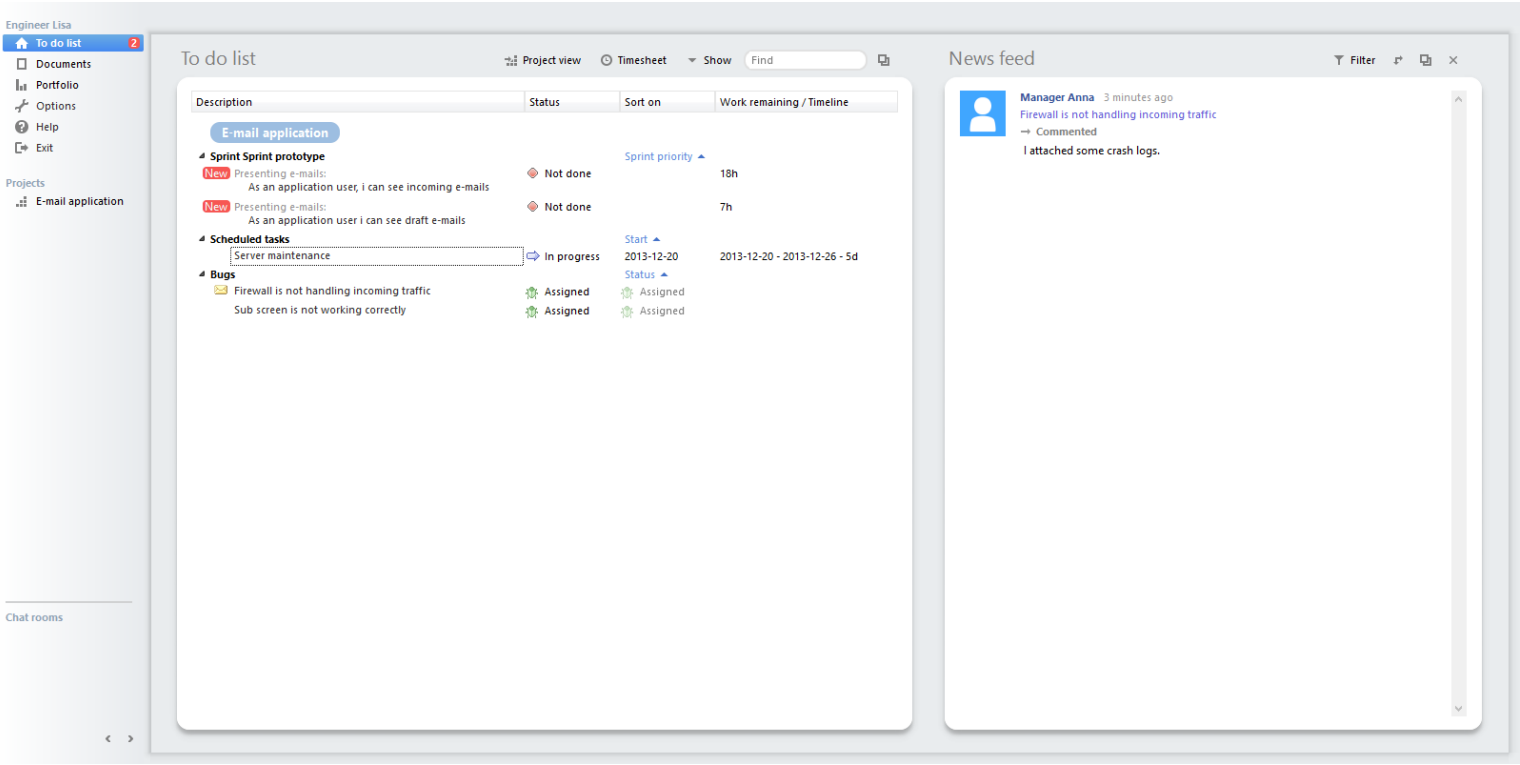
By default sprints contain all project members when created. Keeping a sprint highlighted while creating a new one results in the inheritance of all project members assigned to the highlighted sprint. Sprints can be set to not include any project members when created.

Agile sprint priority

You can also designate which column should be used for setting item priority. This option can be used if you want to use your own custom column to set item priority. Note that in order for custom columns to appear as alternatives in the drop-down list they need to be of the type "Drop list single choice". To read more about custom columns click here.

Using the To do list

The To do list displays a summary of all tasks, items and bugs that have been assigned to the currently logged-in user, as well as a news feed of recent activity. It is also possible to enable a "Time spent" column.



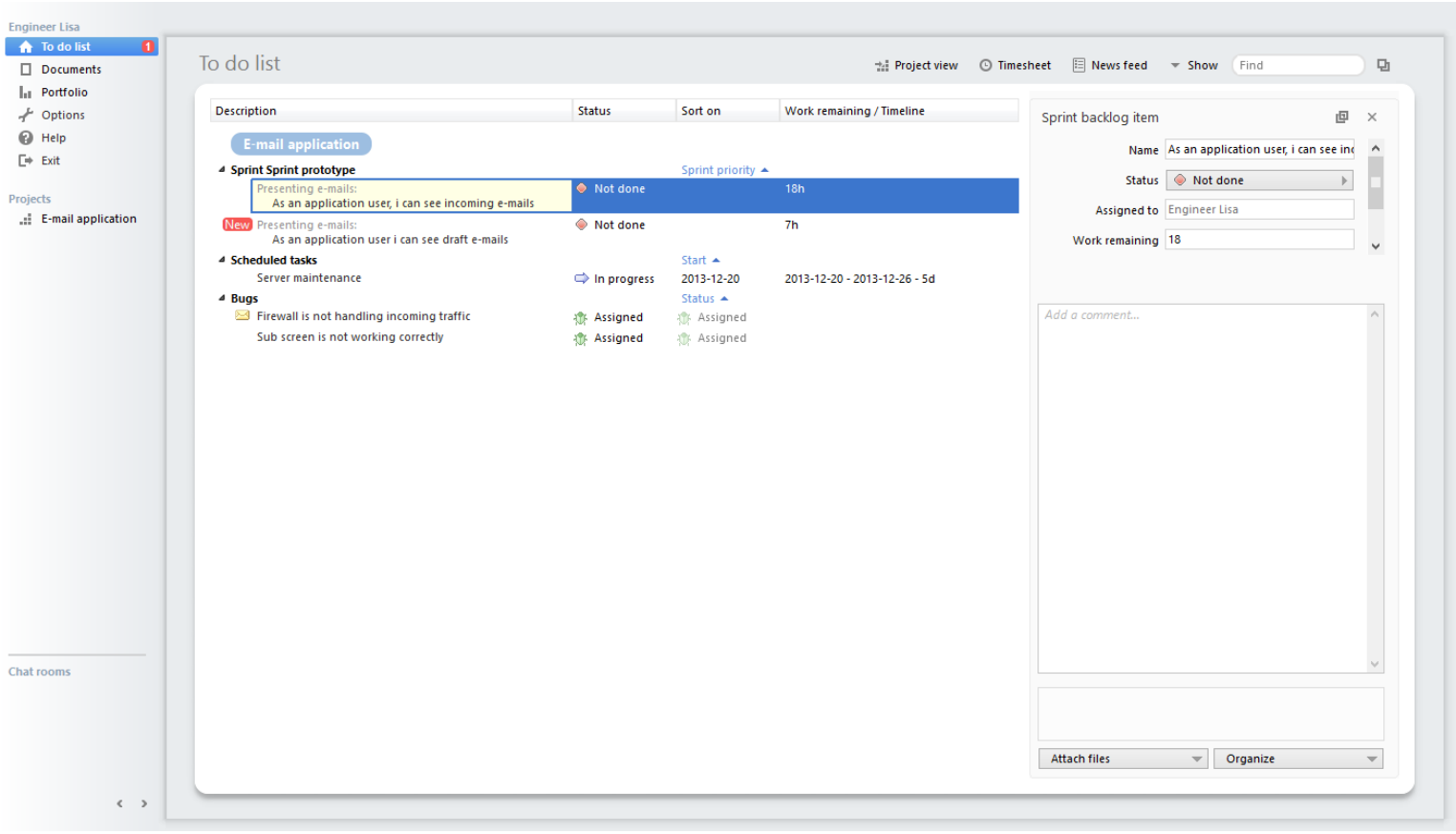
A typical To do list for a co-worker

The To do list

The To do list has separate sections for each project the user is a member of, which are further divided into sections for sprints, scheduled tasks, and bugs. Each item is presented as a summarized task, showing the task name (with the sub-project path, if applicable), the status, and the work or time remaining on the task. The user can freely change status and their work remaining estimates.

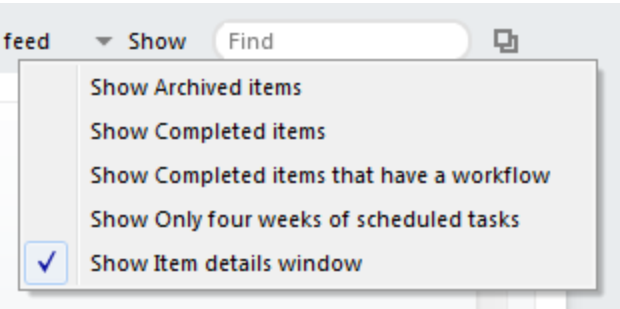
Any new items will be signified by a New icon, also increasing the counter on the To do list entry in the left-hand Navigation pane. Items with new comments will display the New comment icon .

Item details



The To do list with the Item details window active

For more in-depth management of tasks, the To do list can show a Details window for the selected item. This is done by either double-clicking an item, or by navigating to and selecting **Show>Show Item details window**. This menu also contains other visibility options for tasks, such as optionally showing archived or completed items.

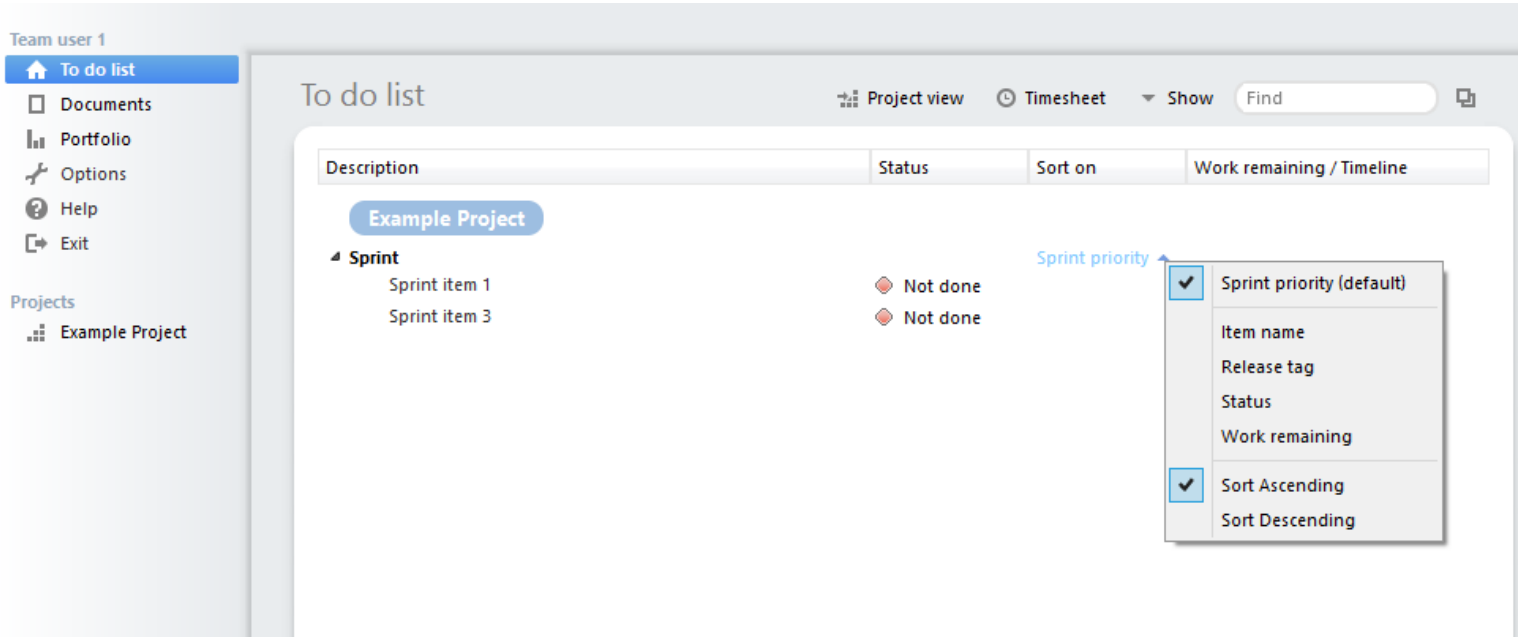


Enabling the Item details window

If the user wishes to see the item in its context, Clicking the planning view icon will display the item in the planning view.

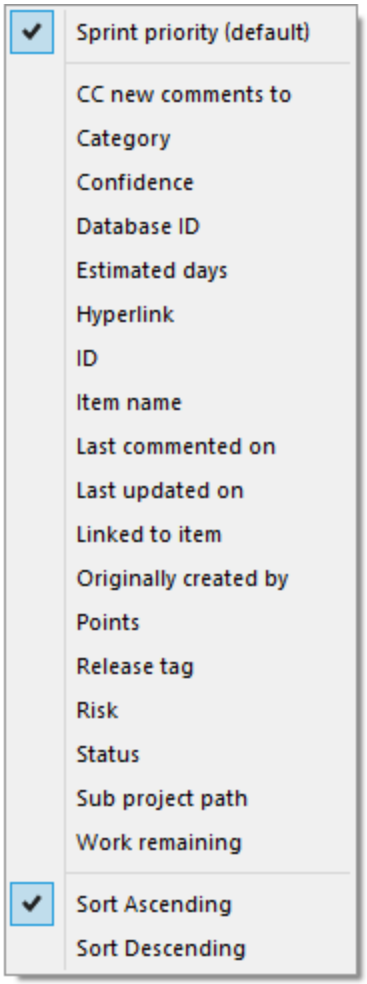
Sub-project sorting

To access the sorting options click on the currently active sorting mode that is displayed in the "Sort on" column.



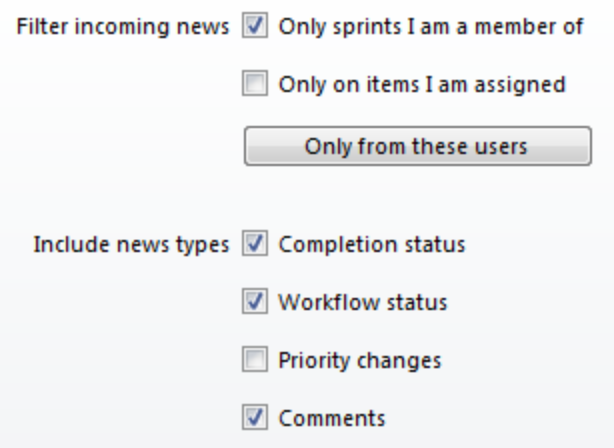
The To do list while displaying sorting options

Columns added to the planning view will also appear as sorting options.



The News feed

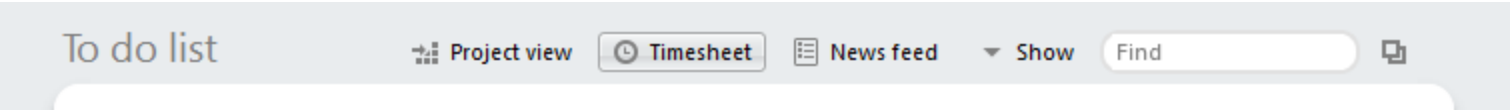
The News feed is a live stream of all the activity deemed relevant to the user. By default, it includes all activity (new / changed tasks, comments, priority changes) in any project the user is a member of, in any sprints to which the user has been allocated. To control the flow of information, the News feed can be filtered by clicking the Filter icon .



The Timesheet

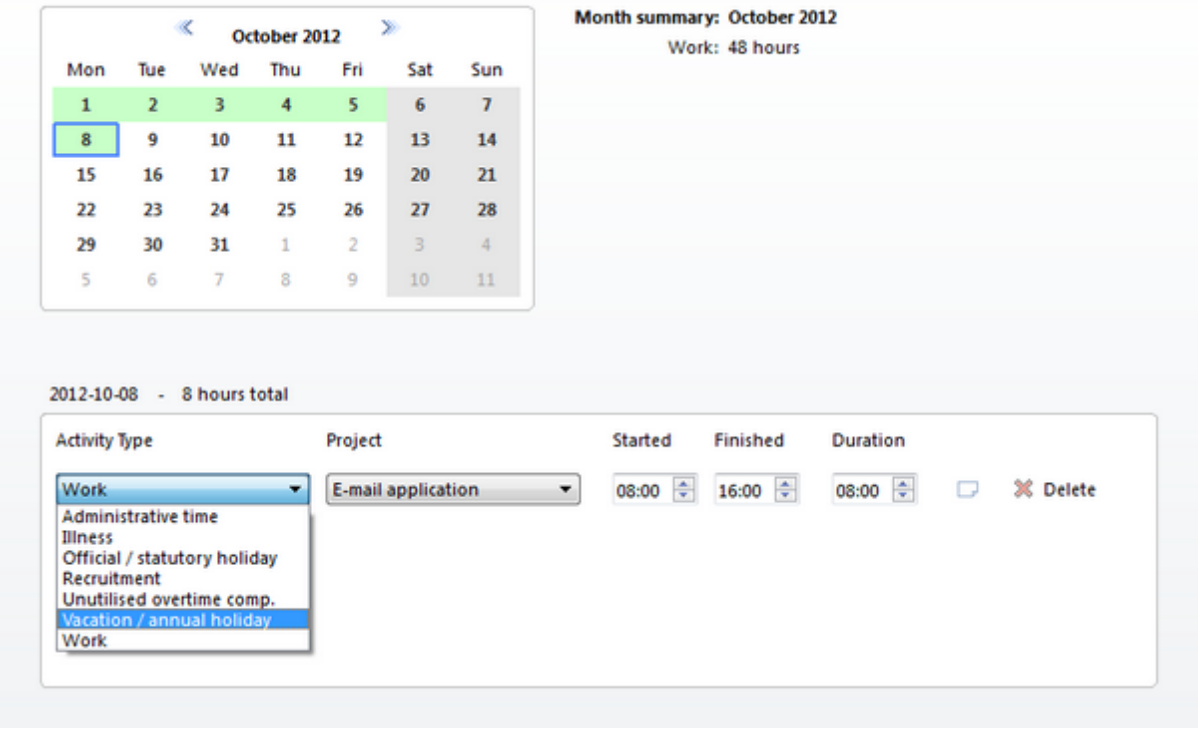
If Hansoft is extended with the time report module, every user has access to their individual timesheet in their To do list. A main project manager may also generate a summary of time reports from the Administration section.

Viewing the timesheet



The **Timesheet** button

At the top of the to-do list is the **Timesheet** button, which brings up the "Timesheet" dialog.

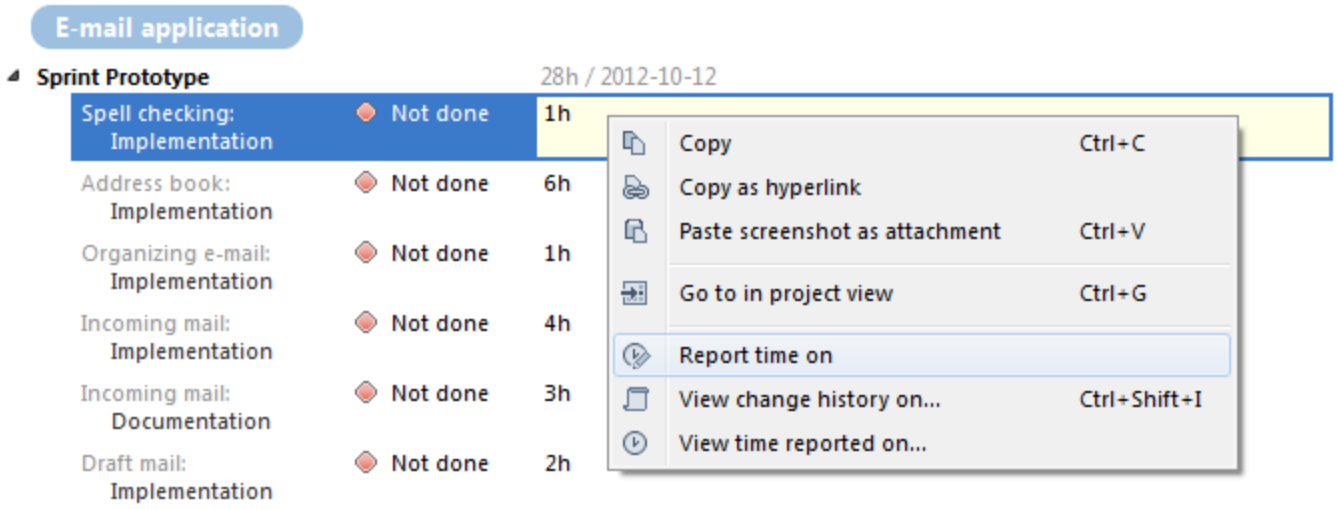


The timesheet dialog

The "Timesheet" dialog shows a calendar, a monthly summary, and the list of time reporting rows for the selected day.

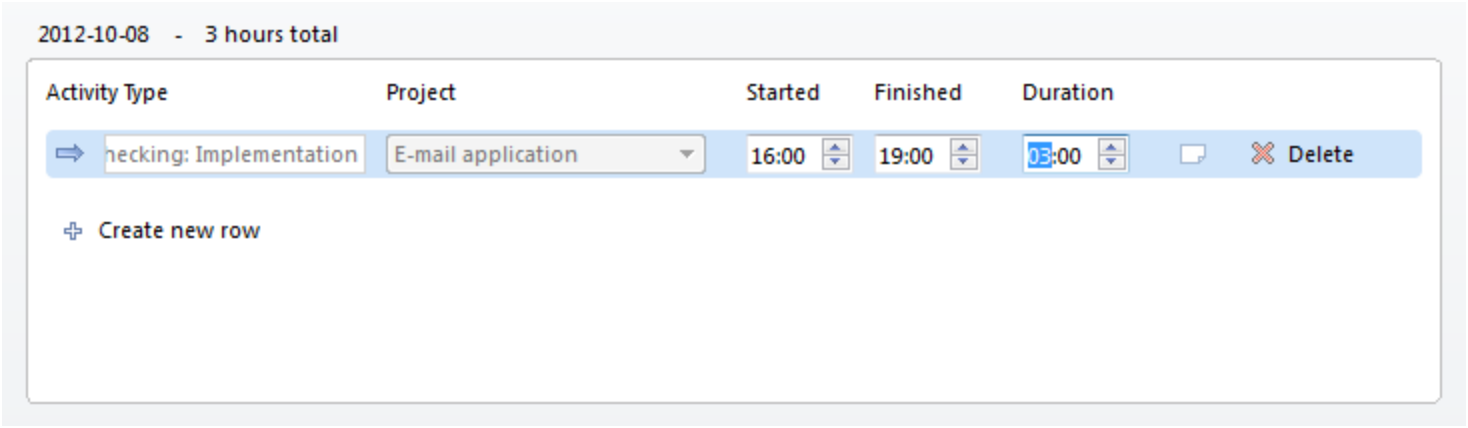
For each day, users can insert one or more rows to account for their activities. Activity types are customizable by the administrator, but the most common one is work. In addition, user may enter a project to which their time is to be accounted, as well as any comments for the timesheet row.

Reporting time on tasks



Reporting time on an individual task

When reporting time on an individual task, the Activity type and Project fields are pre-filled, leaving the user to specify hours for the task.



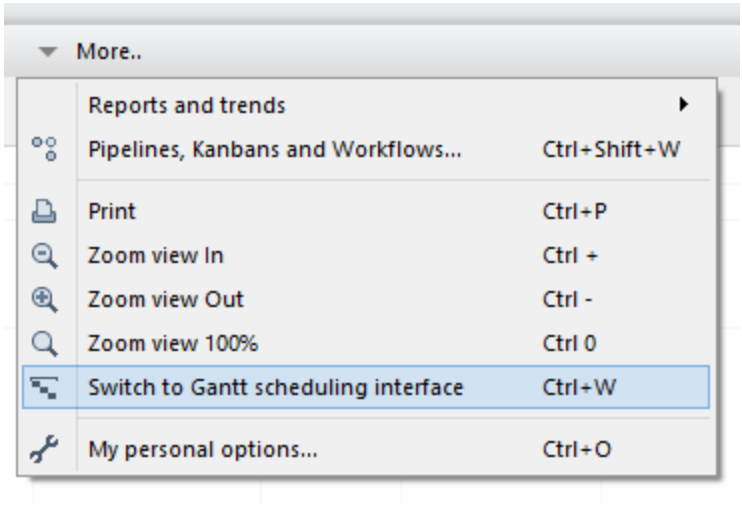
The timesheet row for an individual task

Agile and task scheduling

Hansoft has the unique feature of combining both agile and task scheduling in one project.

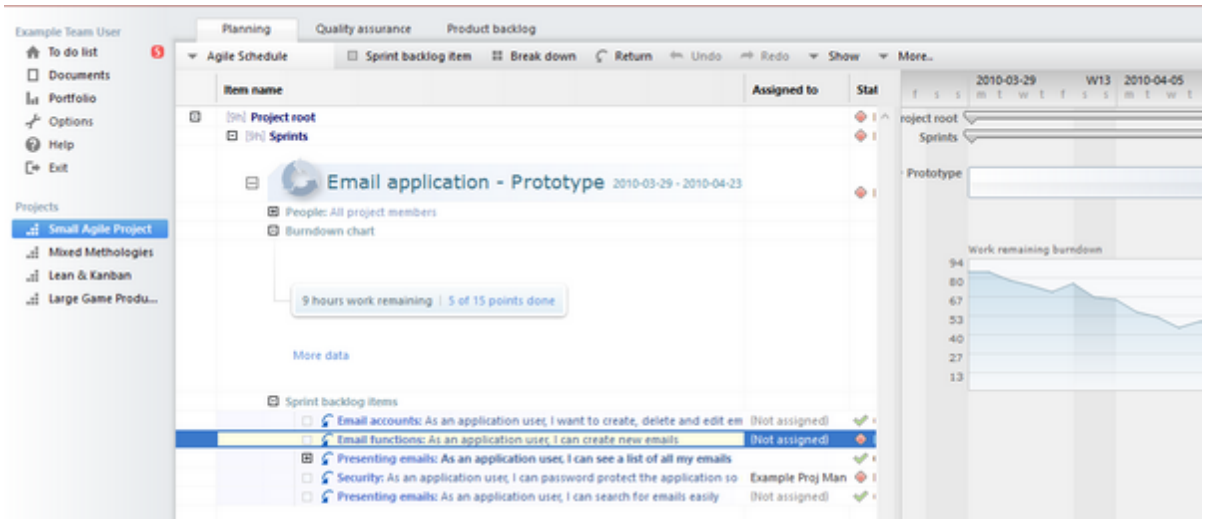
Whether to run an agile or task scheduling project is first decided when you create the project. This selection will then be the default mode for the project, which means that project members and sub project managers will be in this mode when they connect to the project for the first time.

You can always switch between agile and task scheduling modes with keyboard shortcut Ctrl + W (Cmd + W), or via the **More..** menu. This is a personal option that every member of the project can set.

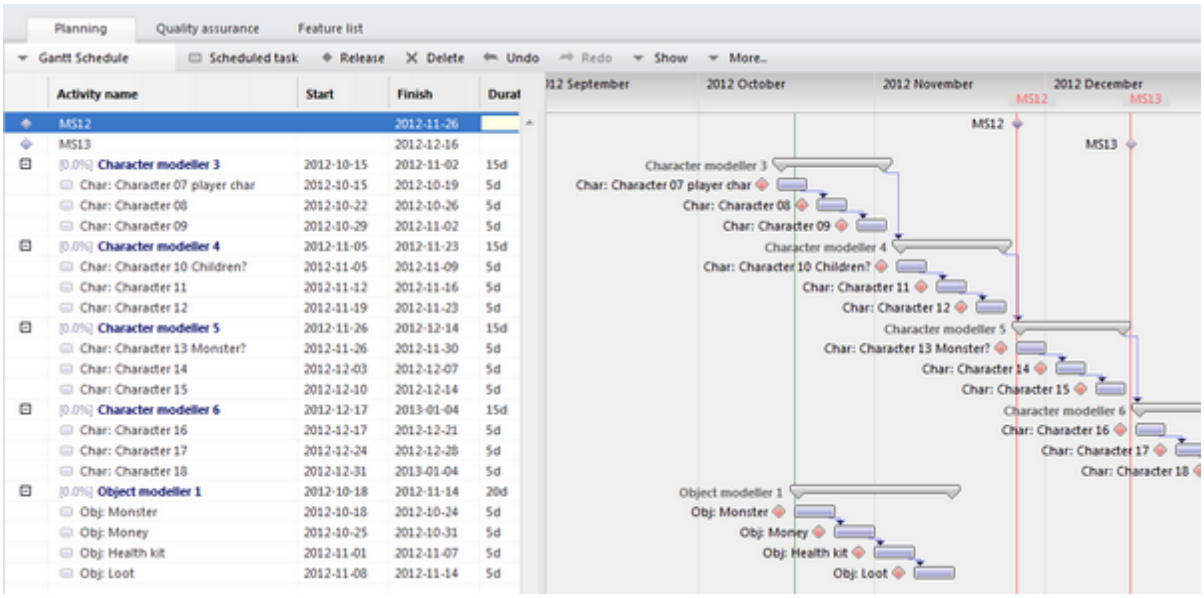

More..
Reports and trends
Pipelines, Kanbans and Workflows... Ctrl+Shift+W
Print Ctrl+P
Zoom view In Ctrl +
Zoom view Out Ctrl -
Zoom view 100% Ctrl 0
Switch to Gantt scheduling interface Ctrl+W
My personal options... Ctrl+O

Switching between Agile and Task scheduling interface

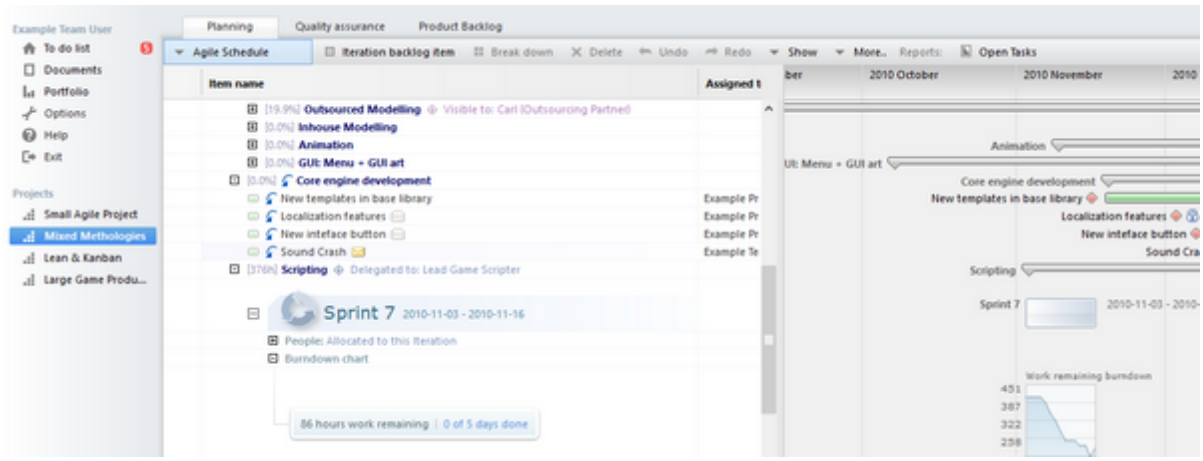
An agile project



A task scheduling project



A combined agile and task scheduling project



Explanation of item/task status in Hansoft

These are some examples that explain how an item acquires its status if broken down into several sub-items.

If any sub-item is Blocked: the sub-project is Blocked

	Sprint backlog items	
1	**Example item**	**Blocked**
2	ex sub-item 1	Completed
3	ex sub-item 2	Blocked
4	ex sub-item 3	Completed

If any sub-item is In progress: the sub-project is In progress

	Sprint backlog items	
1	**Example item**	**In progress**
2	ex sub-item 1	Completed
3	ex sub-item 2	In progress
4	ex sub-item 3	Completed

If all sub-items are Completed: the sub-project is Completed

	Sprint backlog items	
1	**Example item**	**Completed**
2	ex sub-item 1	Completed
3	ex sub-item 2	Completed
4	ex sub-item 3	Completed

If any (but not all) sub-item is Completed: the sub-project is In progress

	Sprint backlog items	
1	**Example item**	**In progress**
2	ex sub-item 1	Completed
3	ex sub-item 2	Not done
4	ex sub-item 3	Completed

If all sub-items are Not done: the sub-project is not done

	Sprint backlog items	
1	**Example item**	**Not done**
2	ex sub-item 1	Not done
3	ex sub-item 2	Not done
4	ex sub-item 3	Not done

If an item is To be deleted: the sub-project will receive a status as if the item that is to be deleted did not exist. A sub-item marked as To be deleted will not in any way affect the status of the sub-project.

	Sprint backlog items	
1	Example item	Completed
2	ex sub-item 1	Completed
3	ex sub-item 2	To be deleted
4	ex sub-item 3	Completed

Getting started with Agile planning

If you have decided to run your project in agile mode, this page will describe how to get started. SCRUM is used as the conventional name when describing agile within Hansoft.

Core components

·Sprints ("iterations" in eXtreme Programming) with specific sprint members, users and burndown charts.

·Sprint backlog items ("iteration stories" in eXtreme Programming)

·Sprint tasks

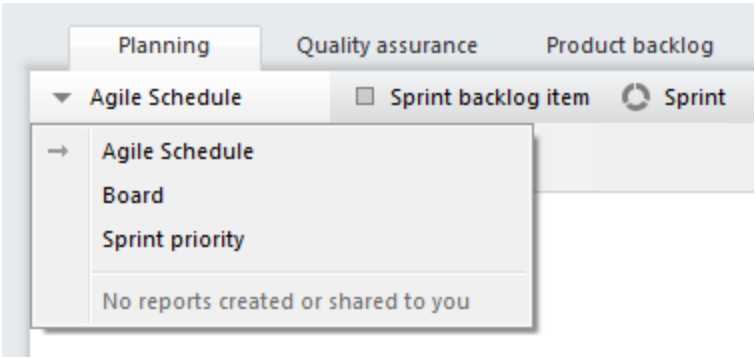
·Releases (Can be referred to as milestones)

·A separate product backlog with backlog items ("stories" in eXtreme Programming) that can be committed to a sprint

·Special customizable agile columns such as category, complexity points, confidence, estimated ideal days, priority, release tag, risk and user tag.

Agile views

In agile projects, you either work directly in the schedule view, on a board, or in a prioritized view. The schedule view offers the full, complete schedule for the project, with all sprints, releases and items, while the Board and sprint priority views are specialized planning tools commonly used in agile planning.

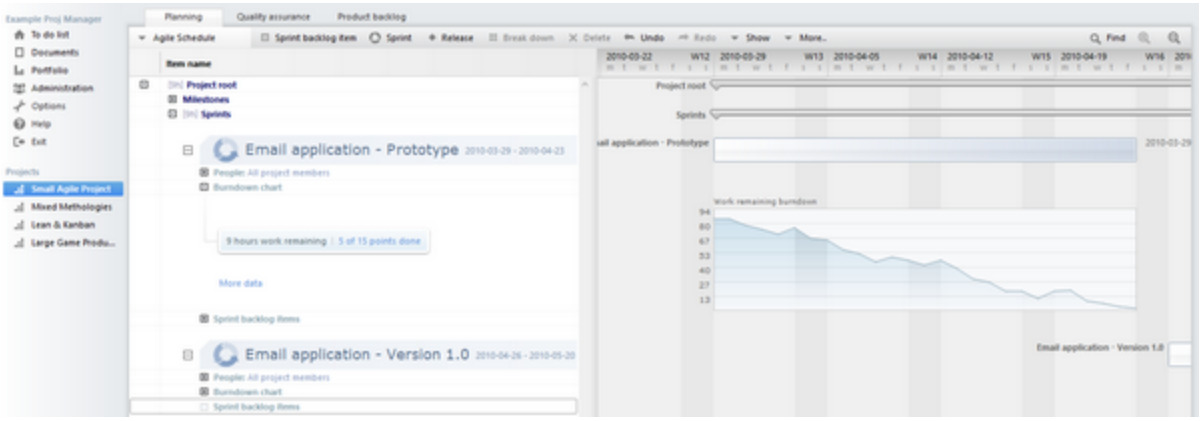


The schedule view selector

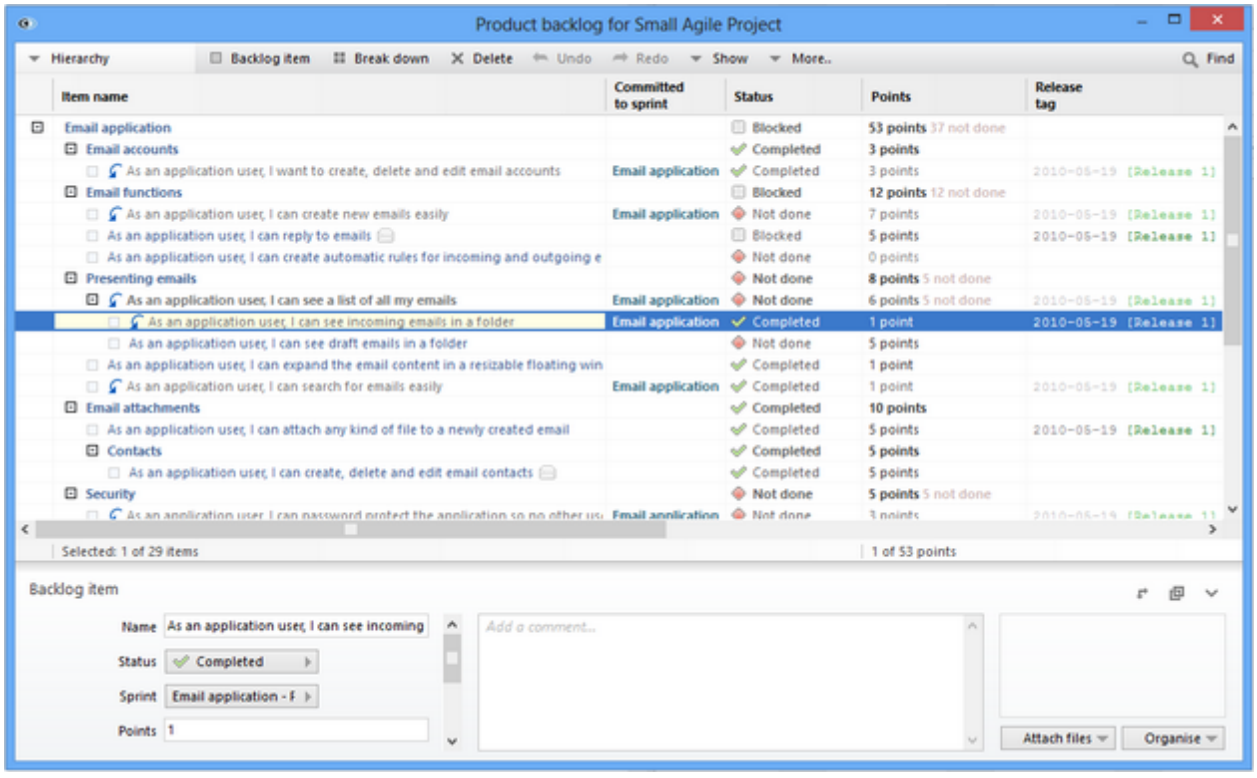
An agile project often starts either by doing sprint planning, or by constructing a product backlog from which user stories are committed to sprints.

Examples

A sprint has been added for the prototype phase of an e-mail application, and items have been committed from the product backlog. A burndown chart can also be seen.



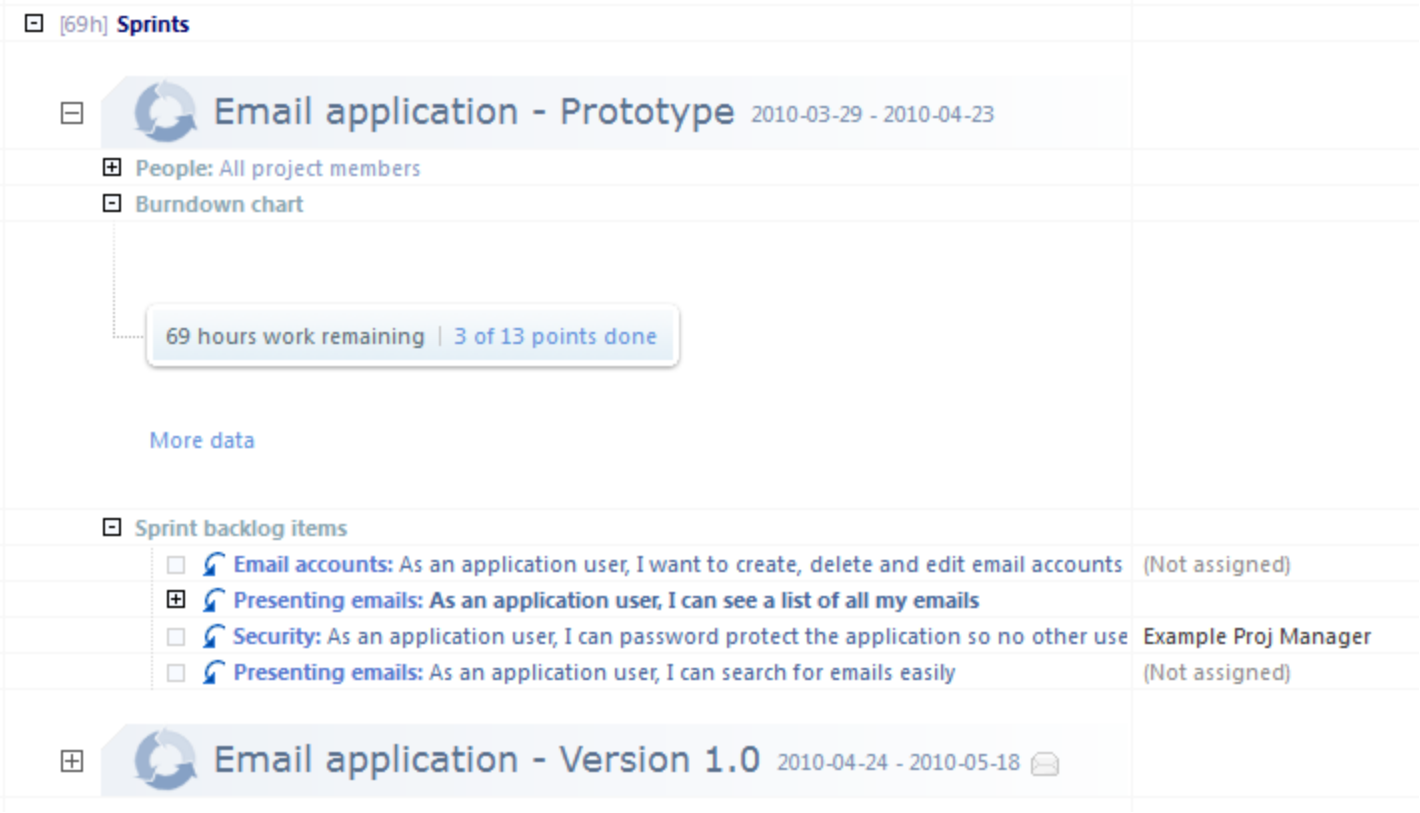
In this screenshot, we have started our agile project by constructing a main product backlog. We have created backlog items (for example requirements, enhancements, bugs etc.) and later prioritized them in items sorted. Some of the items have been committed to a sprint.



Schedule view

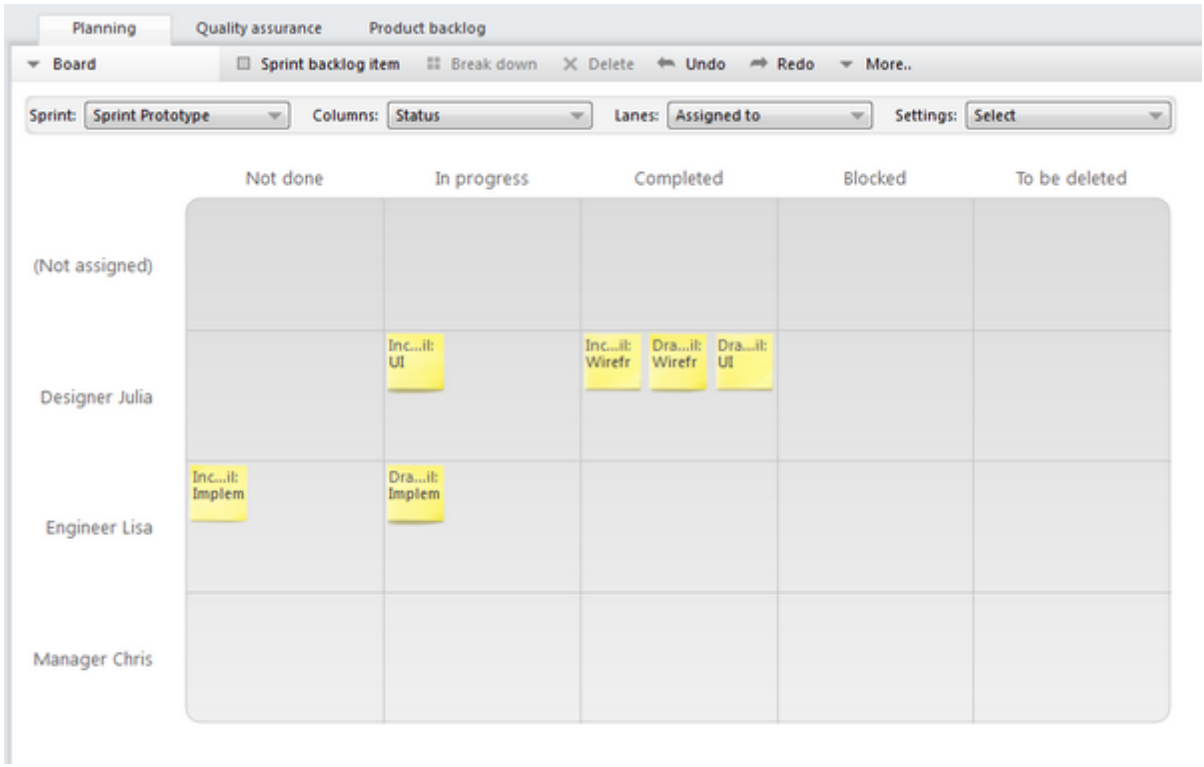
The main goal of this view is to create and structure items in a hierarchy. The hierarchy is often decided upon by how the team and product is structured.

The sprints can be customized with different columns that cover a large spectrum of agile needs. Please see the customize columns page for more information.


[69h] Sprints
Email application - Prototype 2010-03-29 - 2010-04-23
People: All project members
Burndown chart
69 hours work remaining | 3 of 13 points done
More data
Sprint backlog items
Email accounts: As an application user, I want to create, delete and edit email accounts
(Not assigned)
Presenting emails: As an application user, I can see a list of all my emails
Security: As an application user, I can password protect the application so no other use
Example Proj Manager
Presenting emails: As an application user, I can search for emails easily
(Not assigned)
Email application - Version 1.0 2010-04-24 - 2010-05-18

Board view

The main goal of the board view is to create, manage and analyze items by arranging them on a virtual board, simulating the large physical boards often used in agile projects. The board can be configured to display either a swim lane / column matrix, or a Kanban.



A typical Board view, with swim lanes arranged by user and columns by item status

The Board layout toolbar displays selection options for which Sprint (or Kanban) to view, what data to display on the Columns and Lanes, as well as Settings for the item cards themselves.

Sprint view

The sprint view is a matrix of Columns and Lanes. Select a sprint in the Sprint selector, then choose what item data should be represented by the columns and lanes respectively. The board can be zoomed with the mouse wheel, and dragging with the right mouse button will pan-and-scan across the board.

Kanban view

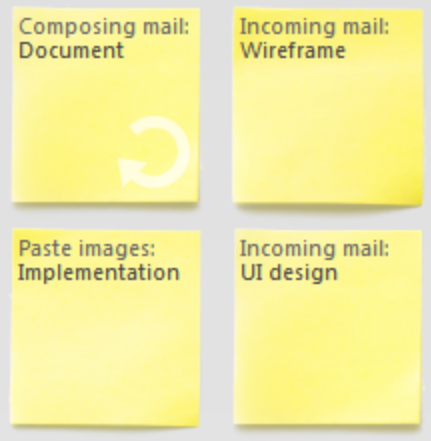
The purpose of the Kanban view is to display all items allocated to a particular type of pipeline. Viewing items in this way allows users to quickly evaluate their work, and to identify and correct bottlenecks should the need arise.

For an in-depth description of the kanban view, read the Kanban chapter of this manual.

Board items

Each item on the board represents a task in a sprint or a pipeline. If the item has been committed from a product backlog, it will be indicated by a backlog icon. Selecting the item and pressing Ctrl + G (Cmd + G)

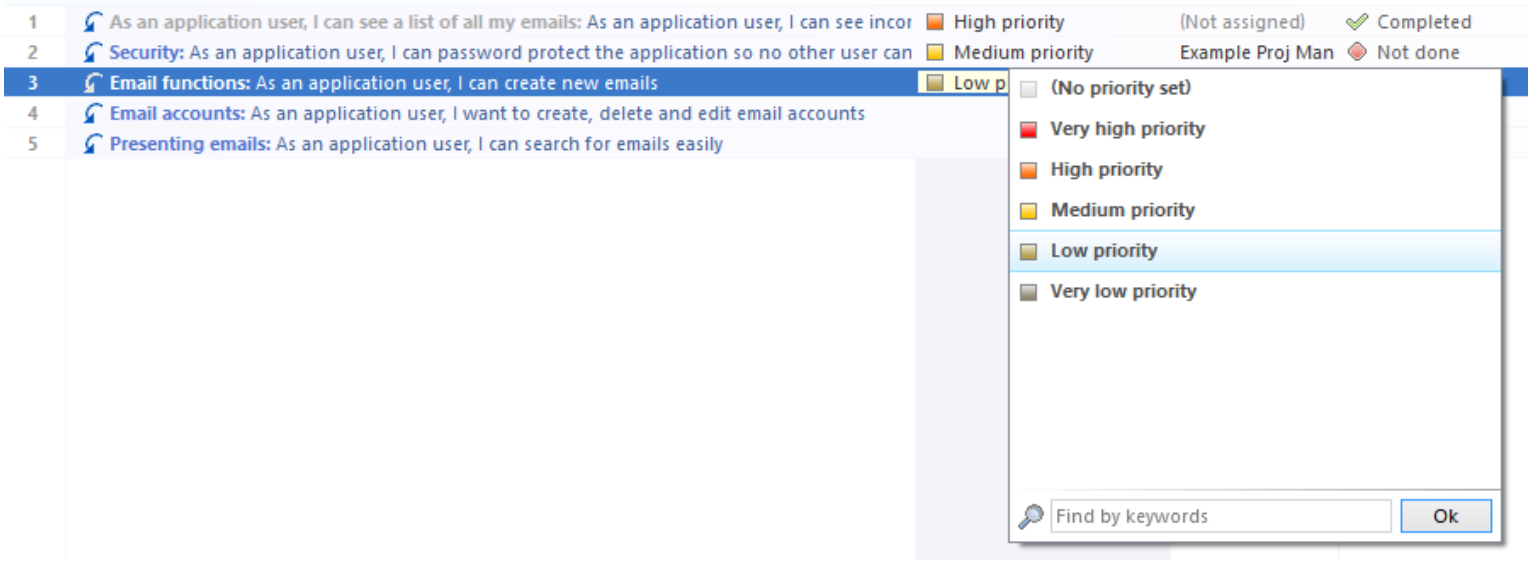
will reveal that item in the product backlog.



A board item committed from the backlog

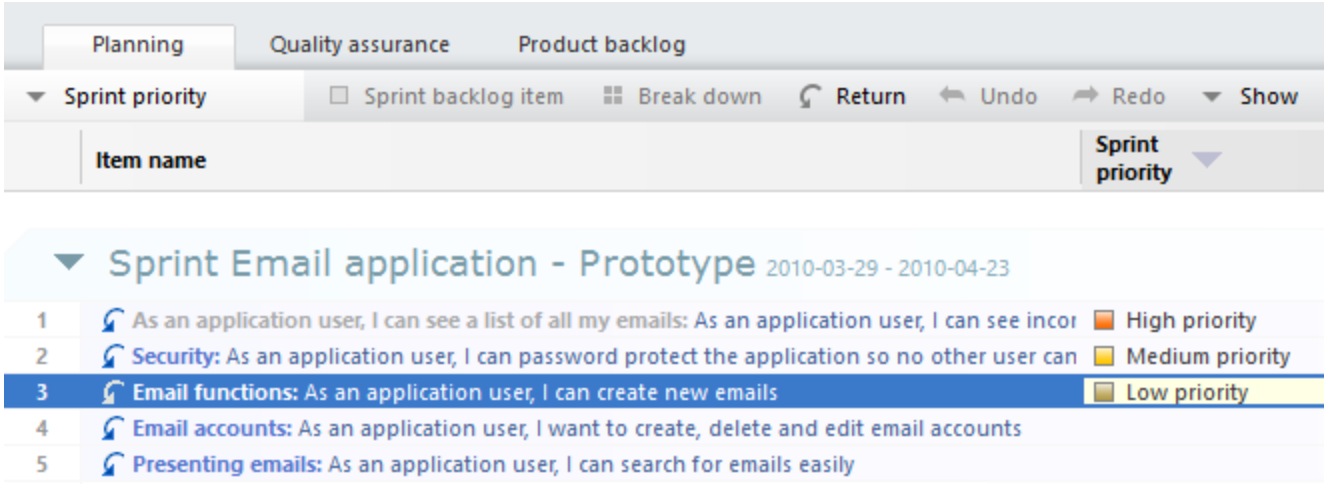
Sprint priority view

Normally, sprint backlog items will be entered into the Schedule view, or committed to it from the product backlog. The Priority column can then be used to prioritize them. The priority will also decide the order of item in each co-worker's To do list.


1 As an application user, I can see a list of all my emails: As an application user, I can see incor
High priority
(Not assigned)
Completed
2 Security: As an application user, I can password protect the application so no other user can
Medium priority
Example Proj Man
Not done
3 Email functions: As an application user, I can create new emails
Low p
4 Email accounts: As an application user, I want to create, delete and edit email accounts
5 Presenting emails: As an application user, I can search for emails easily
(No priority set)
Very high priority
High priority
Medium priority
Low priority
Very low priority
Find by keywords
Ok

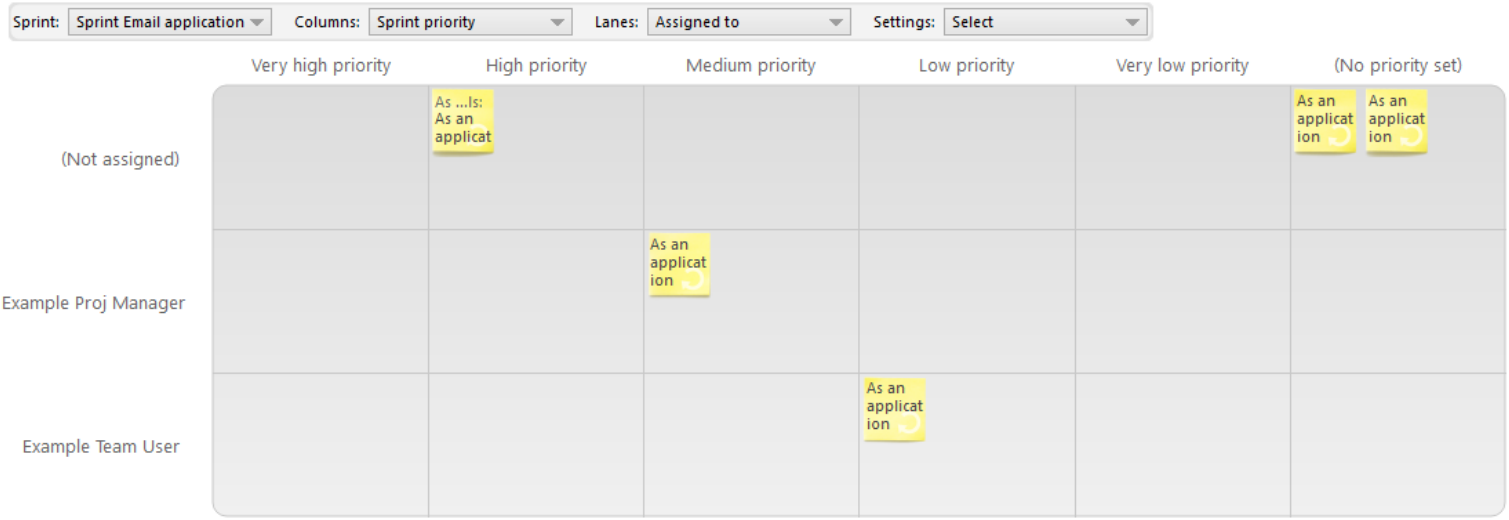
Setting item priority in Schedule view using the Priority column

To make Prioritizing items easier, planning can also be done using the Priority view. In this view, item priority is set simply by dragging items up and down. They will inherit the priority of the items surrounding them.


Planning
Quality assurance
Product backlog
Sprint priority
Sprint backlog item
Break down
Return
Undo
Redo
Show
Item name
Sprint priority
Sprint Email application - Prototype 2010-03-29 - 2010-04-23
1 As an application user, I can see a list of all my emails: As an application user, I can see incor High priority
2 Security: As an application user, I can password protect the application so no other user can Medium priority
3 Email functions: As an application user, I can create new emails Low priority
4 Email accounts: As an application user, I want to create, delete and edit email accounts
5 Presenting emails: As an application user, I can search for emails easily

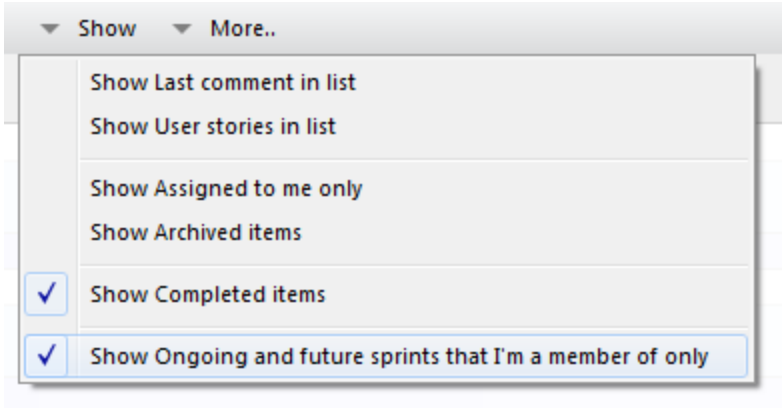
The sprint priority view

Furthermore, the Board view can be configured to use priority either as a column or as a swim lane.

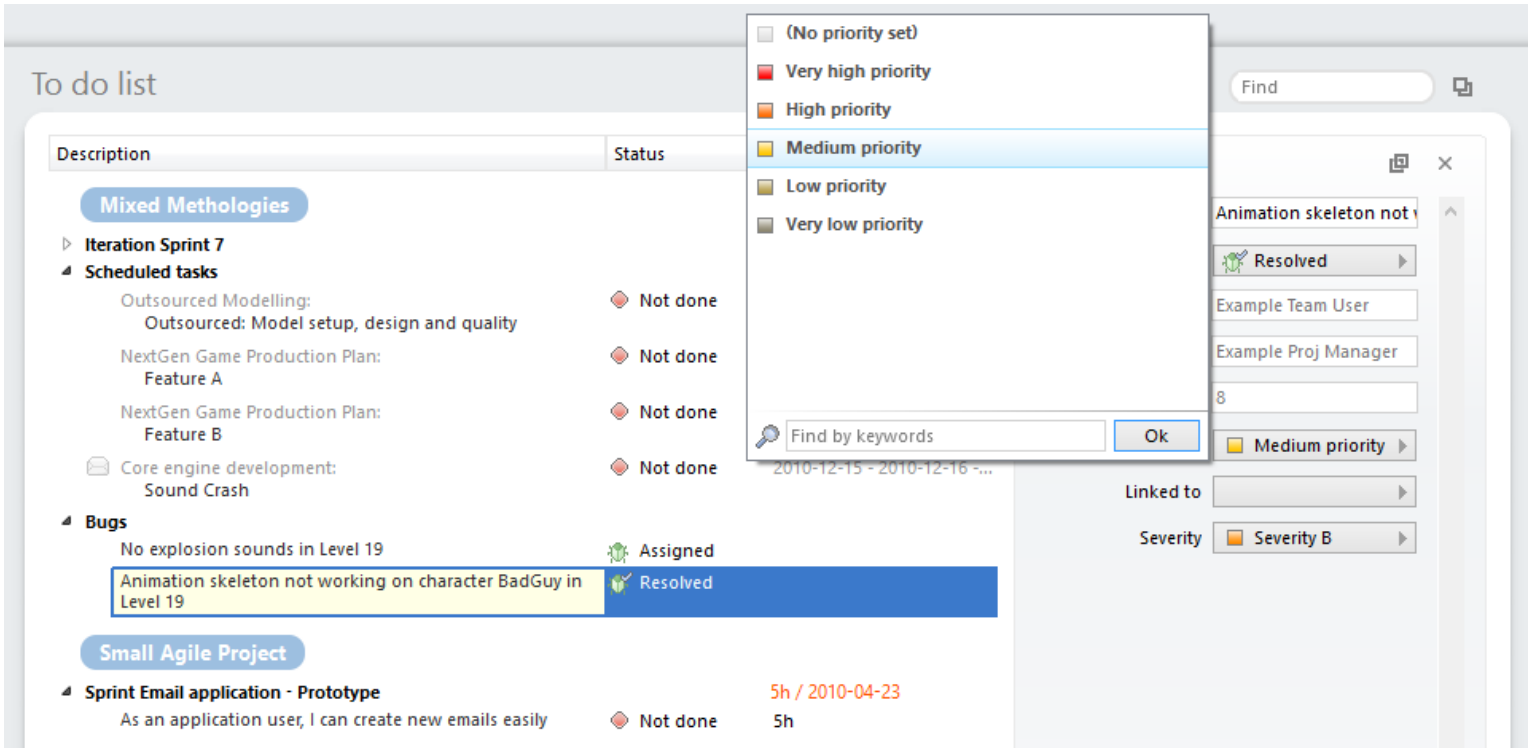


Sprint priority in the board view

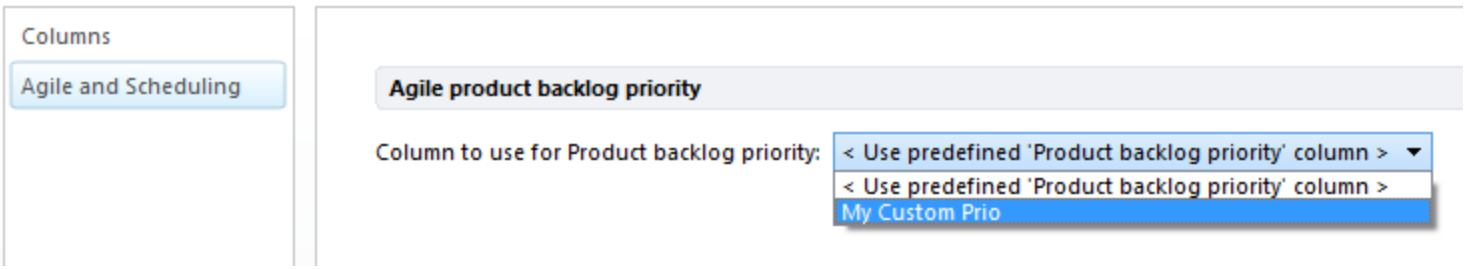
You have commands on the toolbar to hide/show past sprints:


Show
More..
Show Last comment in list
Show User stories in list
Show Assigned to me only
Show Archived items
Show Completed items
Show Ongoing and future sprints that I'm a member of only

The work priority in "Items prioritized" is reflected on the prioritization for the sprint backlog items in the co-workers To do list. Co-workers can also change priority on their items from the To do list (optional):



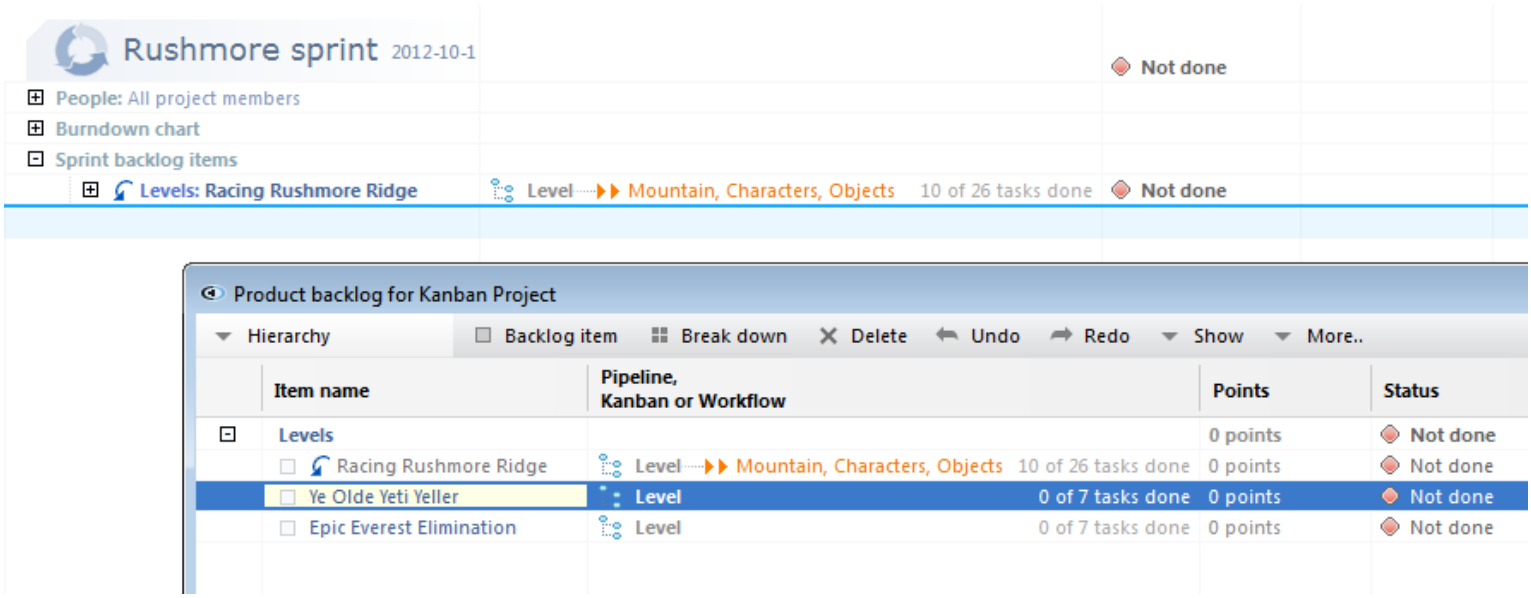
You can select a custom drop list column as your Sprint priority by going in to **Customize project>Priority**. Here you have the option to turn off that team member can prioritize from their To do list:



Committing items from the main backlog to a sprint

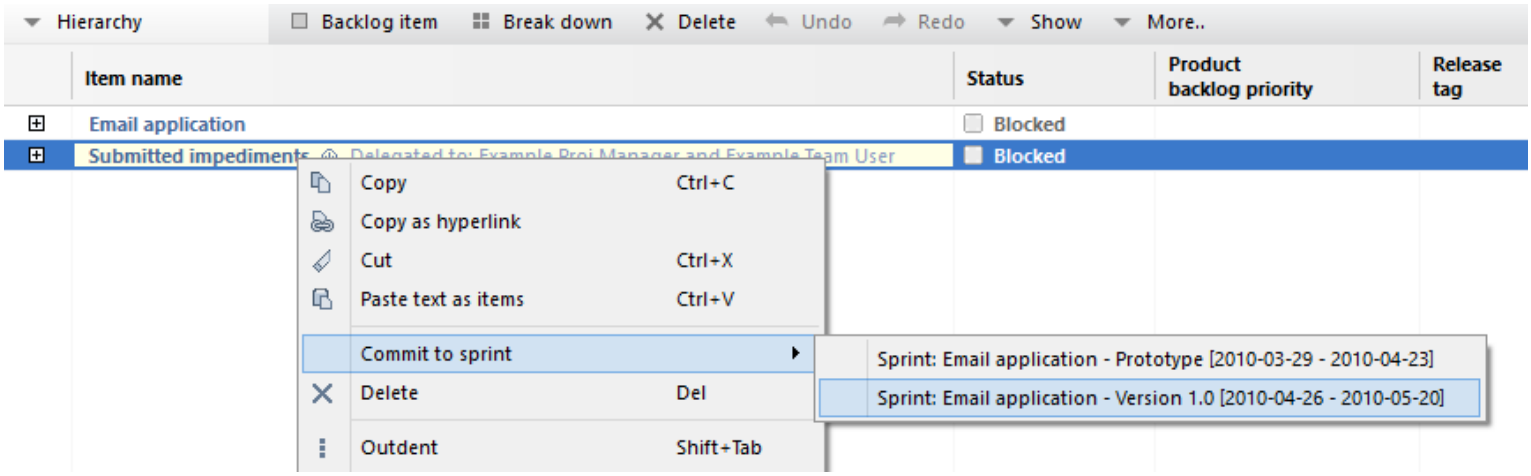
One of the cornerstones of the agile workflow in Hansoft is the ability to commit items from the product backlog to a sprint. In this way you are able to maintain the hierarchy and structure of the backlog (often used by top project managers and producers) while working with individual sprints with their unique hierarchies and structures.

Items can be dragged from the Product backlog window directly into the sprint, indicated by the blue line in the sprint backlog.



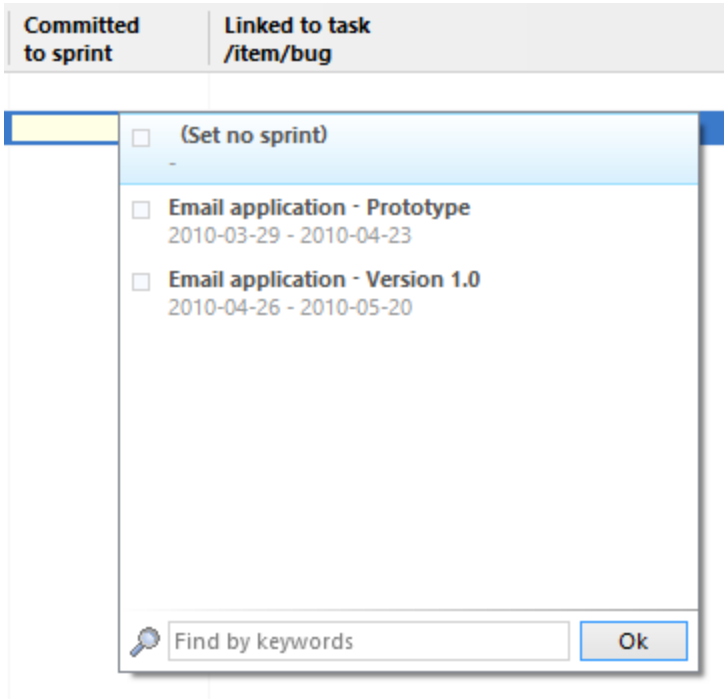
Committing items from the backlog to the sprint using the board view

Items can also be committed using the context menu.



Committing an item to a sprint using the context menu

Furthermore, the pre-created column "Committed to sprint" can be enabled, and used to quickly assign items to sprints.

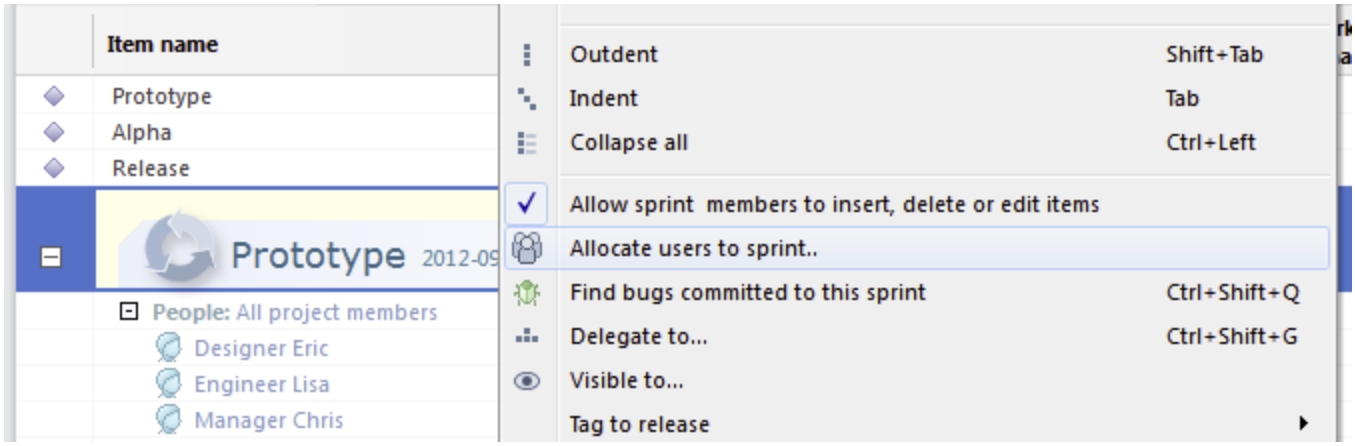


The Committed to sprint column

Managing users in agile projects

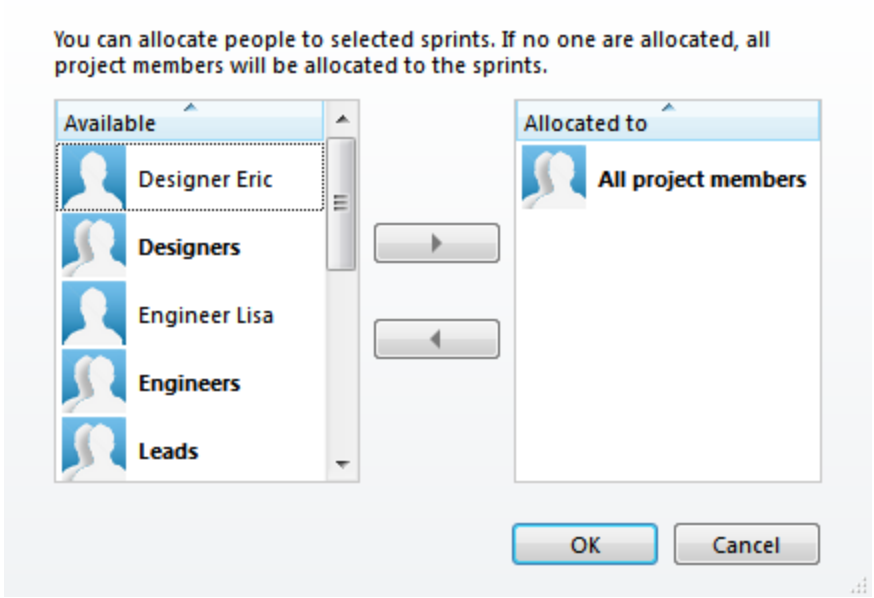
It is generally advised to allocate a specific set of users or user groups to a sprint. This can be important when you have separate parallel programming and art sprints.

Accessing the user allocation dialog



Right-clicking on a sprint

Right click on the sprint, and select **Allocate users to sprint..** in the context menu. You can also right click on a single user in the People list, and select **Allocate users to sprint**.



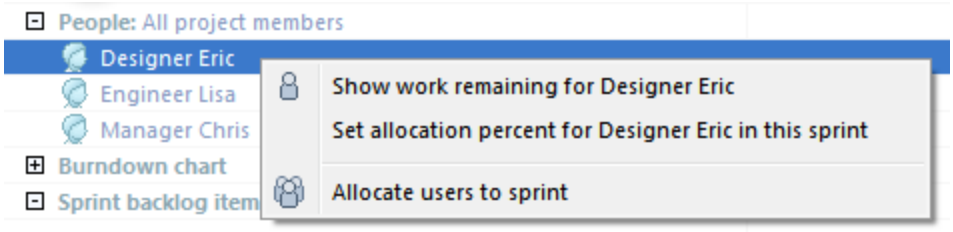
The user allocation dialog

Allocating users to sprints also enables use of the work remaining column. When users update the estimated work remaining, the user allocation meters on the timeline part of the schedule is also updated to

reflect the total work remaining for each user. Additionally, the portfolio section of Hansoft accurately reflects the user allocation across the entire portfolio.

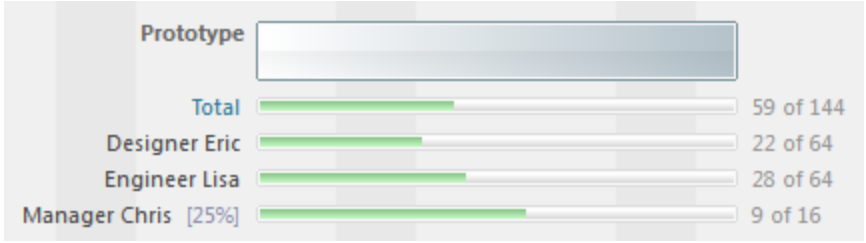
Prototype 2012-11-01 - 2012-11-12
59h
People: All project members
Designer Eric
Engineer Lisa
Manager Chris
Burndown chart
Sprint backlog items
As a user, I can see my e-mail: Presenting mail 33h
As a user, I can write e-mail Delegated to: Team Blue 26h
Composing mail 26h
Format text 7h
Paste images 11h
Wireframe 0h Designer Eric
UI design 4h Designer Eric
Implementation 7h Engineer Lisa
Document 8h Manager Chris
Prototype
Total 59 of 192
Designer Eric 22 of 64
Engineer Lisa 28 of 64
Manager Chris 9 of 64

The user allocation section in the schedule timeline



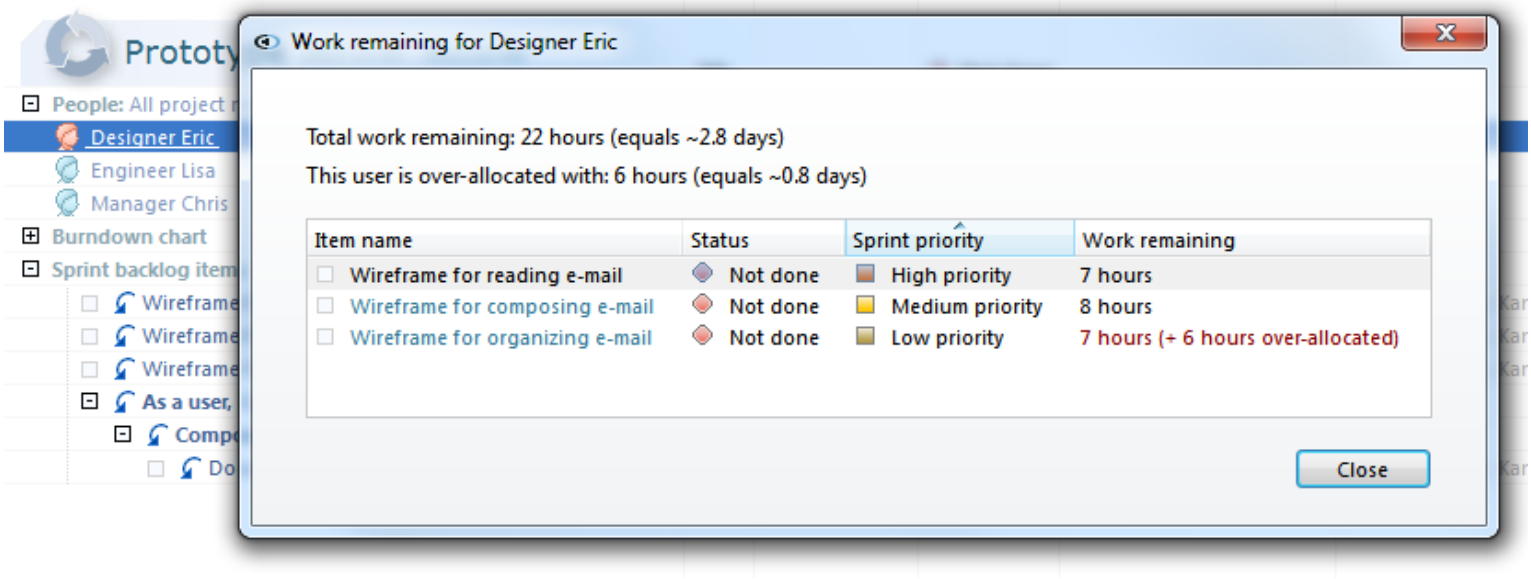
Setting allocations by right-clicking a user

Users can be allocated by a percentage, to accommodate the fact that users can work on several sprints in parallel, or that users might have responsibilities outside of the sprint work.



A part-time allocation to a sprint

Clicking a user in the People section will display a summary of tasks for that user in the sprint. Tasks that are the allocated time will be displayed in red.

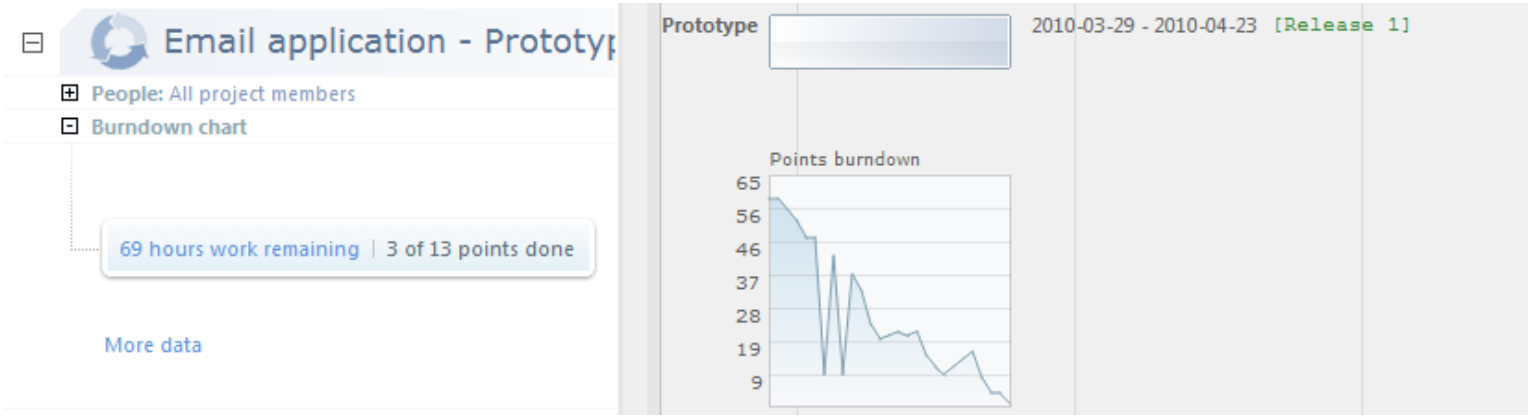


Sprint burndown charts

Burndown charts also play a central part in agile projects. As the total work remaining, ideal days or points changes day to day within a sprint, it forms a burndown chart, the shape of which is denoted as a signature. This chart and signature can tell us a lot about the rate at which the teams and their corresponding individuals or groups are working and also when they are likely to be finished.

The burndown chart

Depending on if you use points and or ideal days, different boards will be visible (like "Points" below) in the burndown chart in the list view. Click each board to switch the burndown chart in the timeline view between work remaining, ideal days or points.



Drawing more data in the chart

You can select the following options to draw more data in chart after you have selected work remaining, ideal days or points as your main chart:

·Also draw ideal days or points

·Work created, changed or deleted

·Work remaining and predictions for individual users (such as "John Smith")

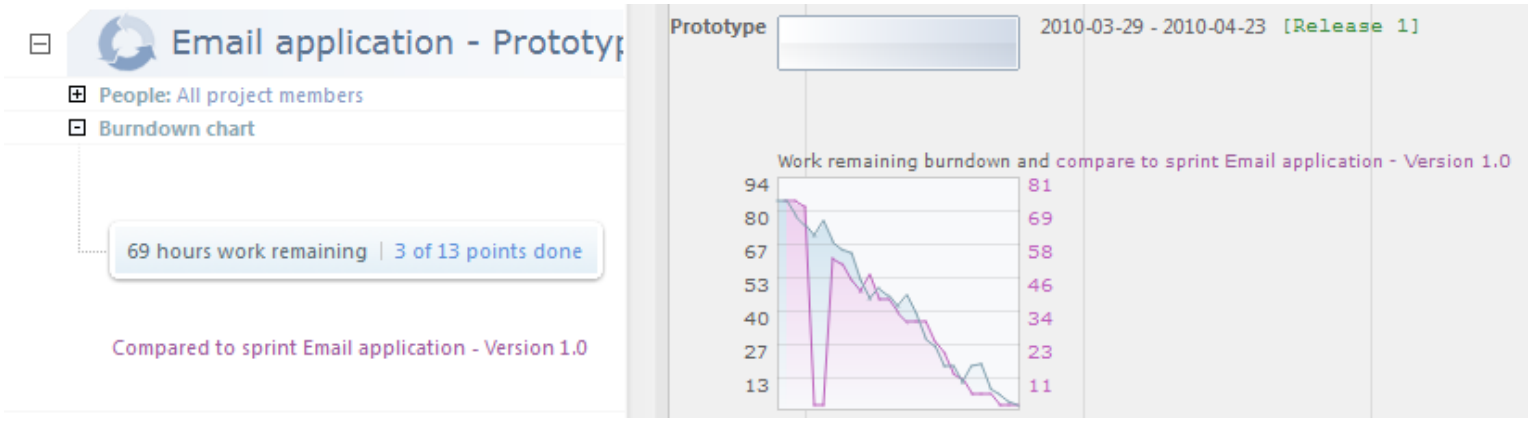
·Work remaining for user groups (such as "Programmers")

·Work remaining on selected items (such as all "design" tasks)

·Ideal burndown line

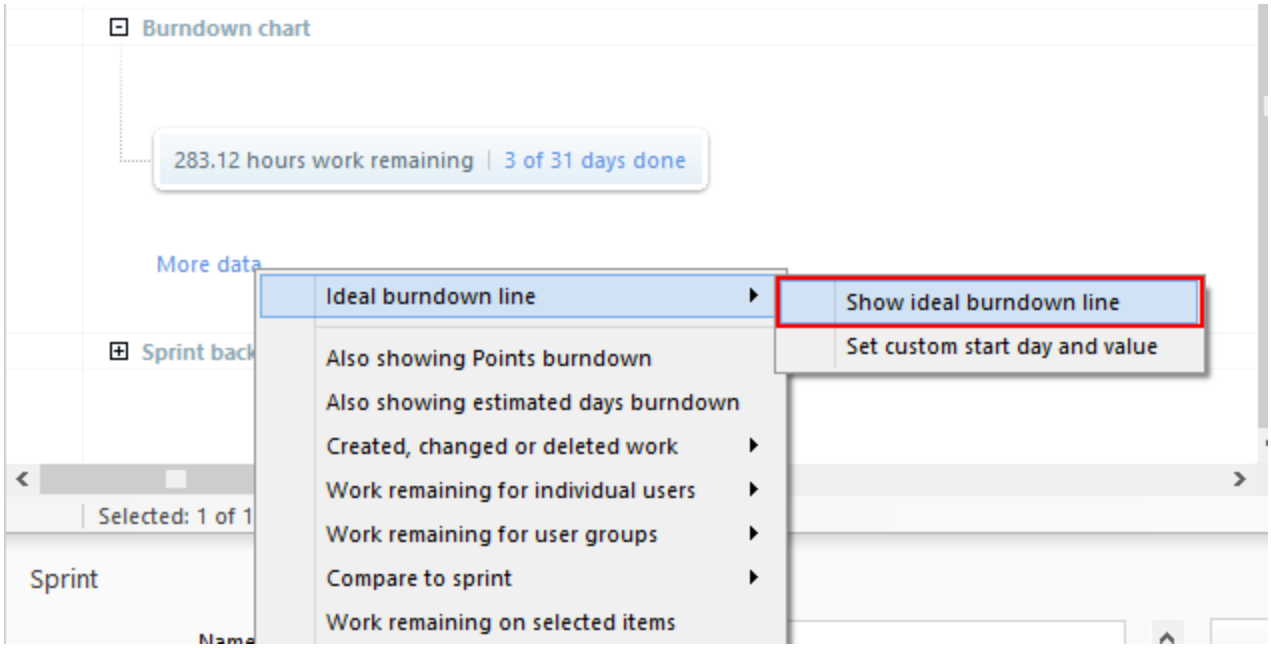
·Sprint prediction

In the screenshot below there is an example of comparing a past sprint to the ongoing one:



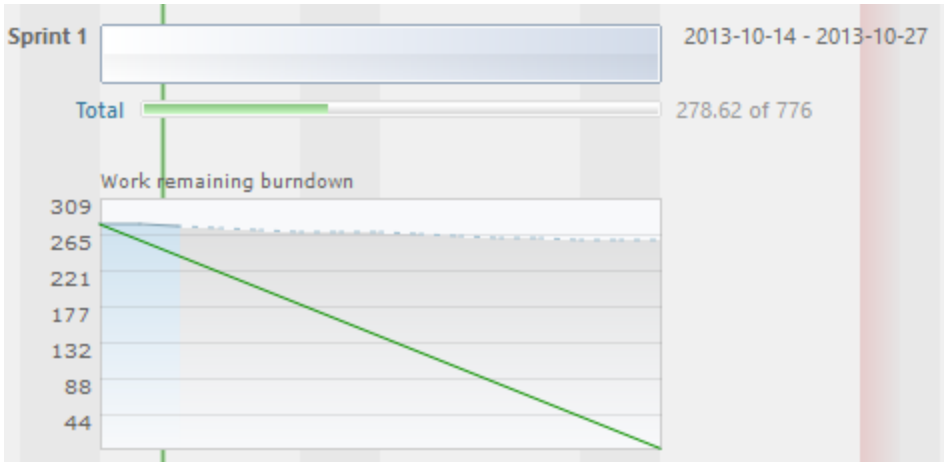
Adding an ideal burndown line

Click **More data**


Burndown chart
283.12 hours work remaining | 3 of 31 days done
More data
Sprint back
Selected: 1 of 1
Sprint
Ideal burndown line
Also showing Points burndown
Also showing estimated days burndown
Created, changed or deleted work
Work remaining for individual users
Work remaining for user groups
Compare to sprint
Work remaining on selected items
Show ideal burndown line
Set custom start day and value

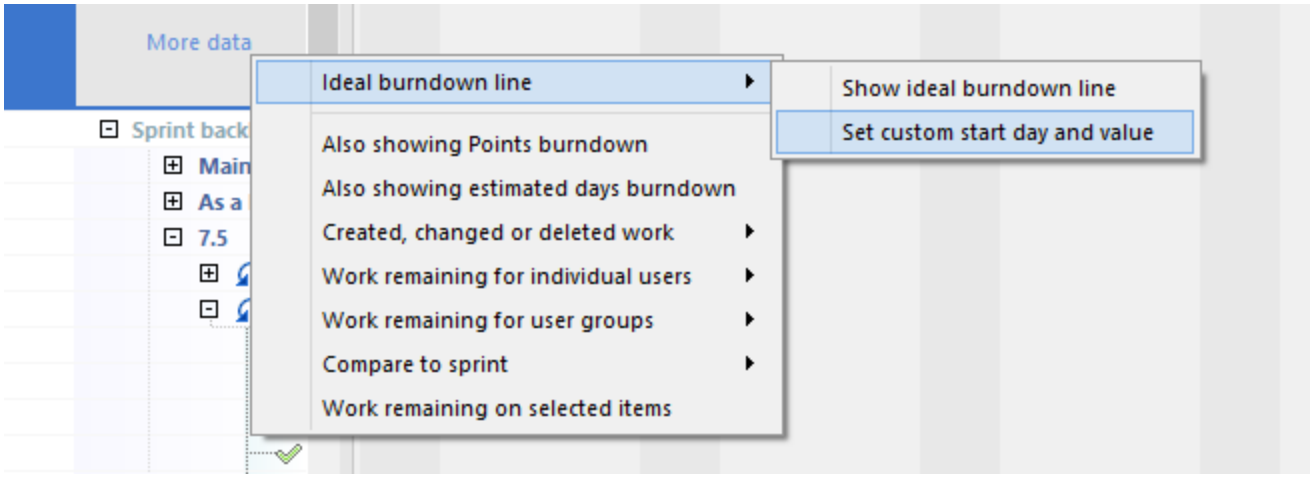
Enabling this option will render an "ideal" burndown line on the burndown chart.

For an example see the image below.

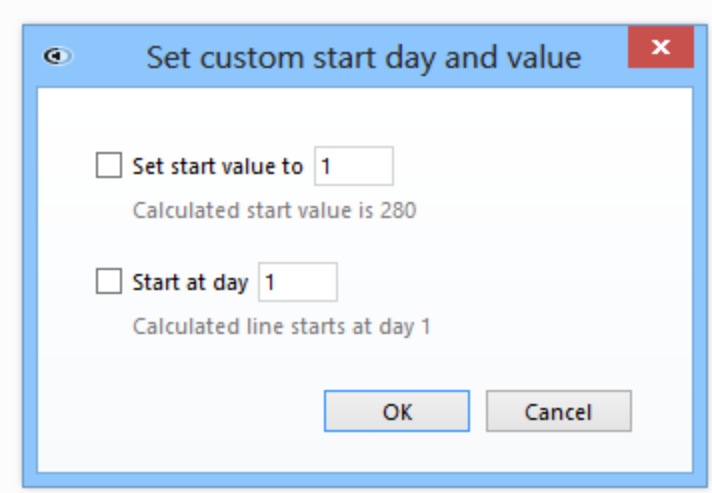


You can customize the "ideal" burndown line by going to:

Ideal burndown line>Set custom start day and value


More data
Ideal burndown line
Also showing Points burndown
Also showing estimated days burndown
Created, changed or deleted work
Work remaining for individual users
Work remaining for user groups
Compare to sprint
Work remaining on selected items
Show ideal burndown line
Set custom start day and value

You can then set the start day of the ideal burndown line as well as the starting value.


Set custom start day and value
Set start value to 1
Calculated start value is 280
Start at day 1
Calculated line starts at day 1
OK
Cancel

Note that this option is also available for the release burndown chart.

Release burndown chart

Release burndown charts also play a central part in agile projects. The signature shows the overall progress for a project or a delivery.

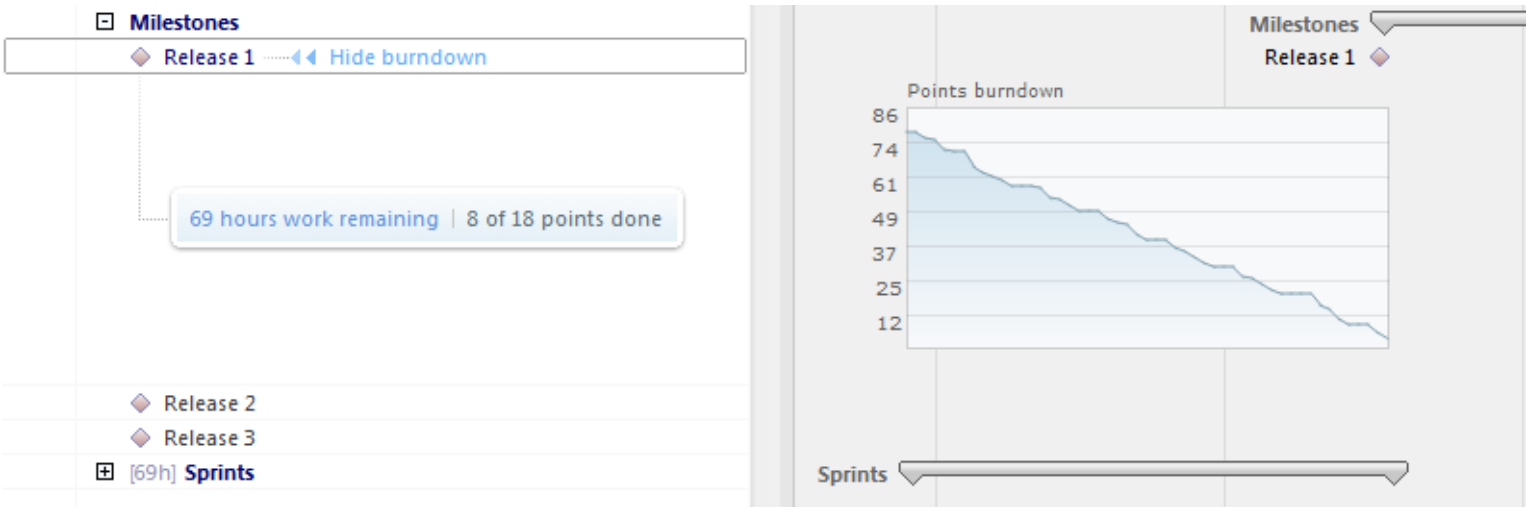
Showing the release burndown chart

In order to show burndown charts on releases / milestones you must assign a sprint / iteration to the release. The sprint must start before the release is due.

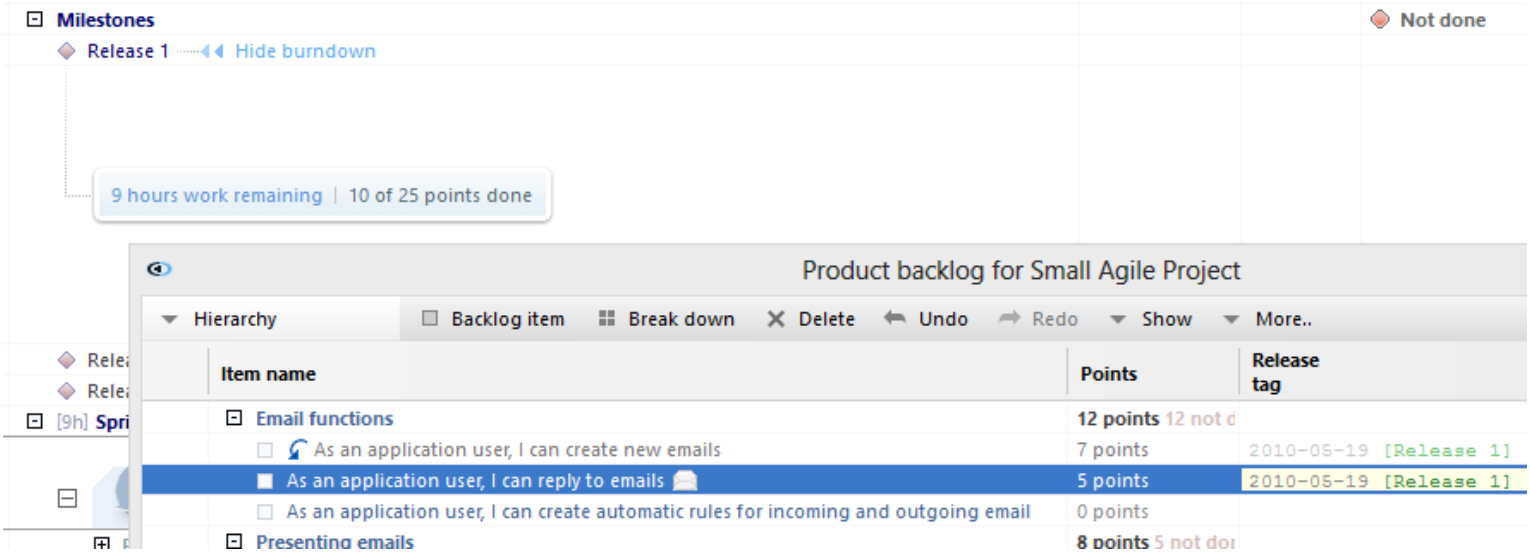
The start date of the burndown is when the first of all assigned sprints start and the end of the burndown is when the release is due.

The burndown chart

Depending on if you use points and or ideal days, different boards will be visible (like "Points" below) in the burndown chart in the list view. Click each board to switch the burndown chart in the timeline view between work remaining, ideal days or points.



Items in the backlog that are not committed to a sprint but assigned to a release are also included in the burndown numbers

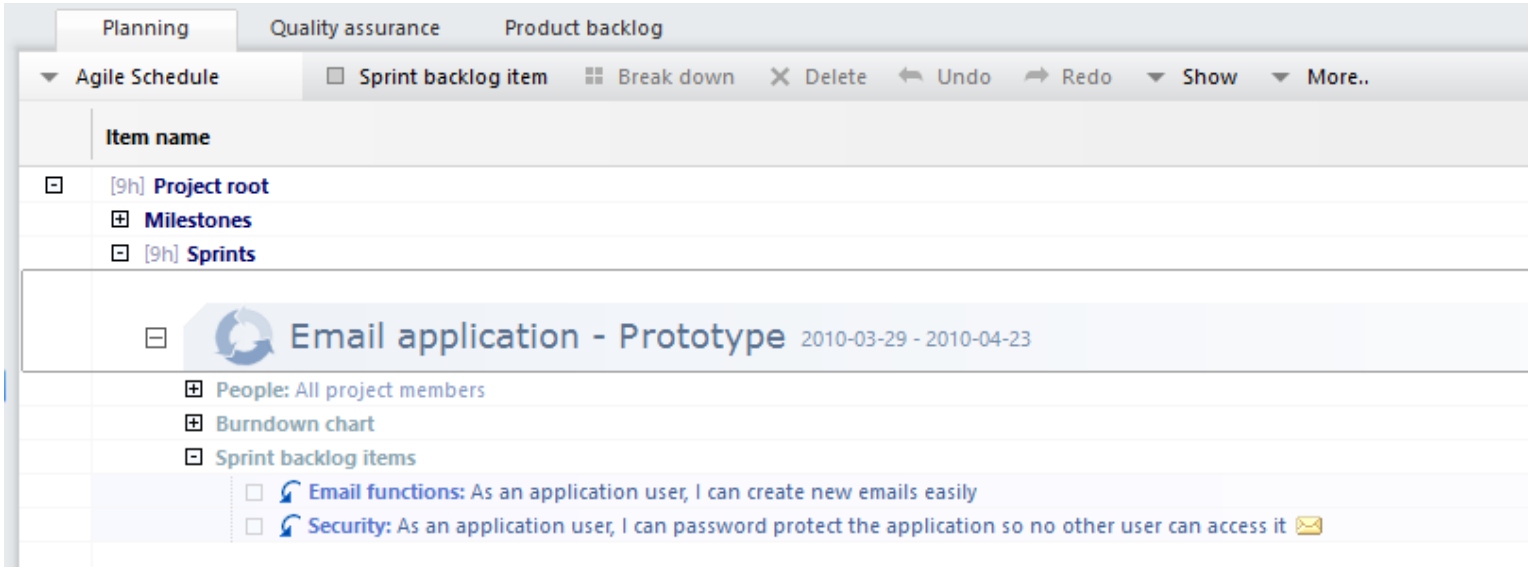


Involving team members

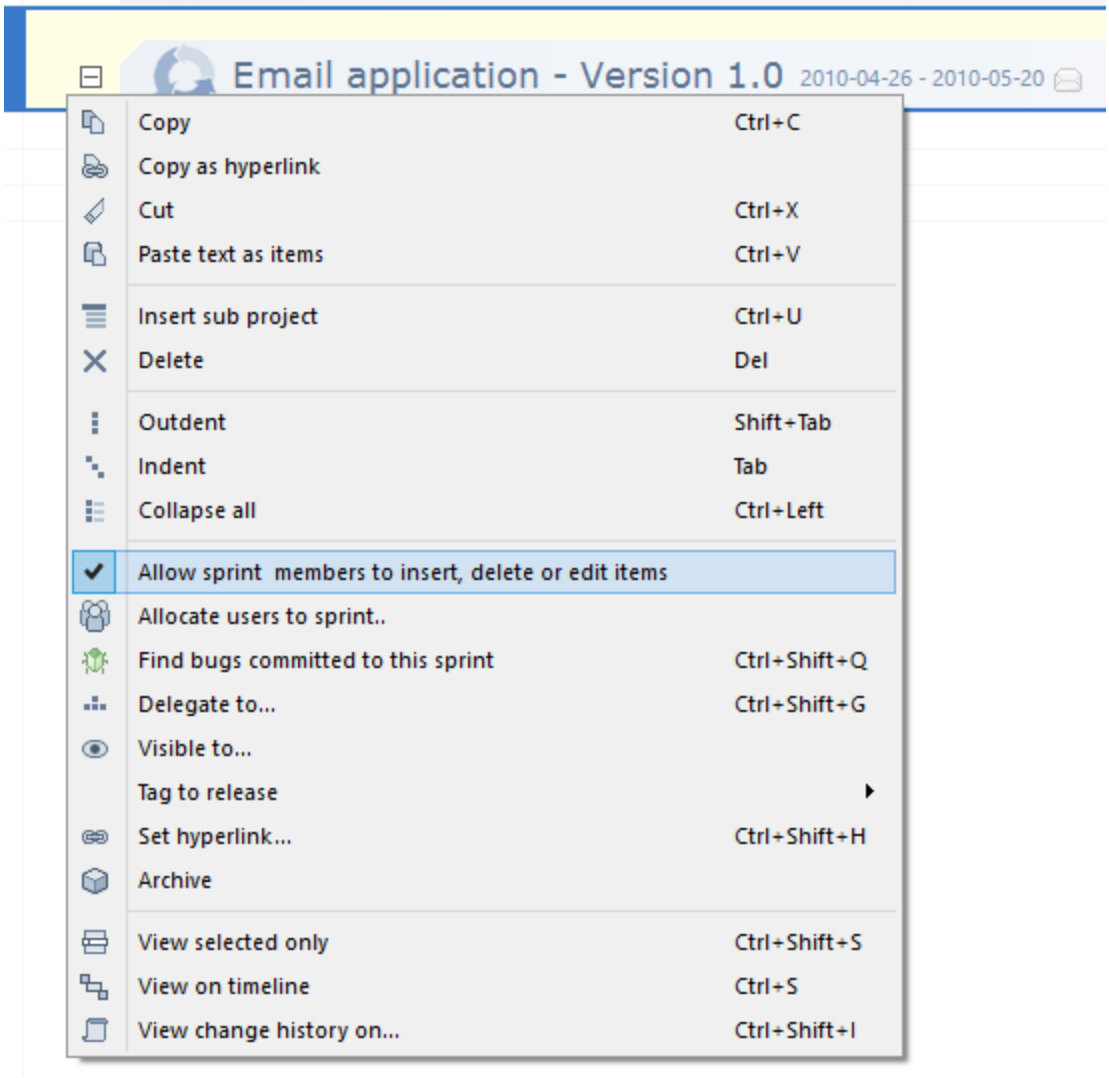
Involving team members is an important aspect in agile projects. Hansoft provides unique functionality to allow team members who are not project managers to insert, delete and edit sprint backlog items. In addition to this, Hansoft also provides functionality to break down backlog items into tasks and prioritize them.

The default setting in Hansoft is that members of a sprint can create, delete and change sprint backlog items. They cannot, however, change any property of the sprint, such as who is a member of the sprint or when it starts or ends. Only a "Main project manager" or someone with delegated authority can change the property of the sprint.

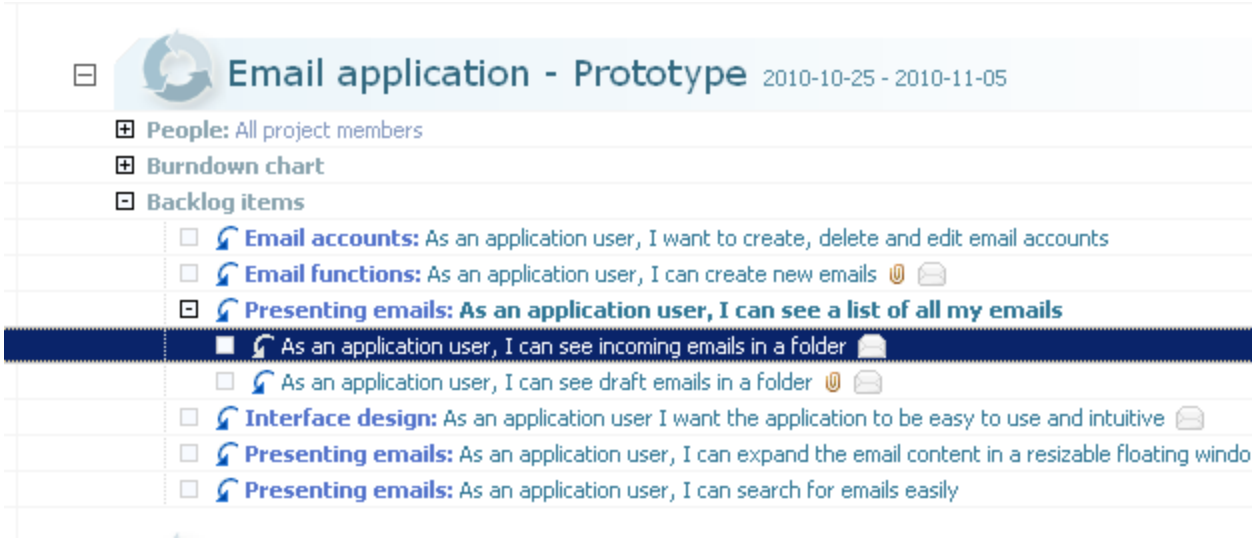
This is how it looks from the perspective of a team member; the blue areas indicate that he/she can insert, delete and edit sprint backlog items here.



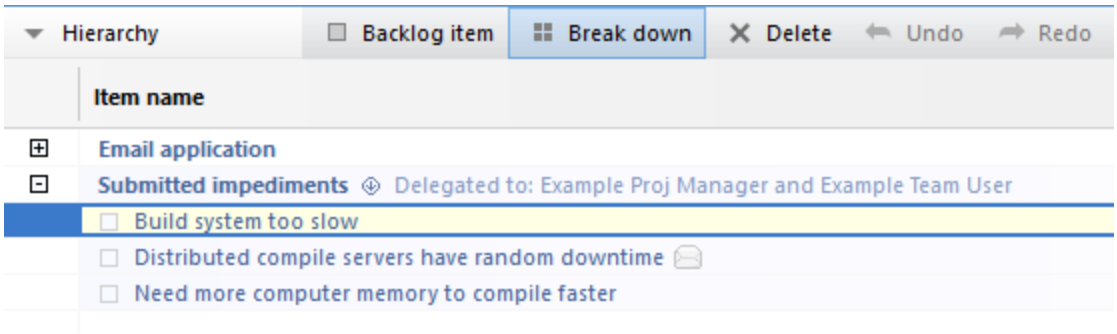
If you are a main project manager or someone with delegated rights, you can right click and remove the flag **Allow sprint members to insert, delete or change items**:



From the perspective of a team member the result will now be that he/she cannot do anything (because the flag **Allow sprint members to insert, delete or change items** is now unchecked):


Email application - Prototype 2010-10-25 - 2010-11-05
People: All project members
Burndown chart
Backlog items
Email accounts: As an application user, I want to create, delete and edit email accounts
Email functions: As an application user, I can create new emails
Presenting emails: As an application user, I can see a list of all my emails
As an application user, I can see incoming emails in a folder
As an application user, I can see draft emails in a folder
Interface design: As an application user I want the application to be easy to use and intuitive
Presenting emails: As an application user, I can expand the email content in a resizable floating windo
Presenting emails: As an application user, I can search for emails easily

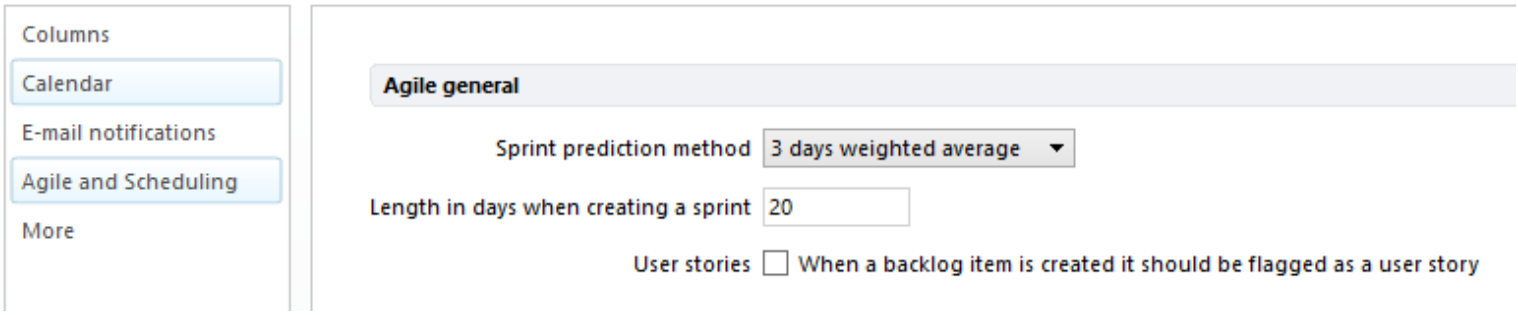
A team member can break down backlog items / iteration stories or continue to insert tasks directly from the To do list or in the planning view:



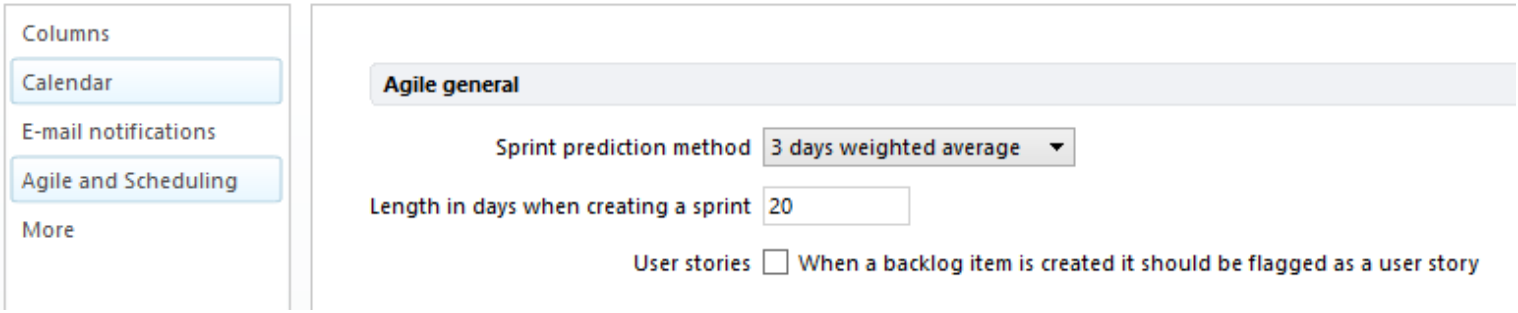
User stories

Hansoft has extensive functionality to create, edit, view and print user stories. User stories (in agile methodology) are high level feature descriptions formulated as one or two sentences in the everyday language of the user.

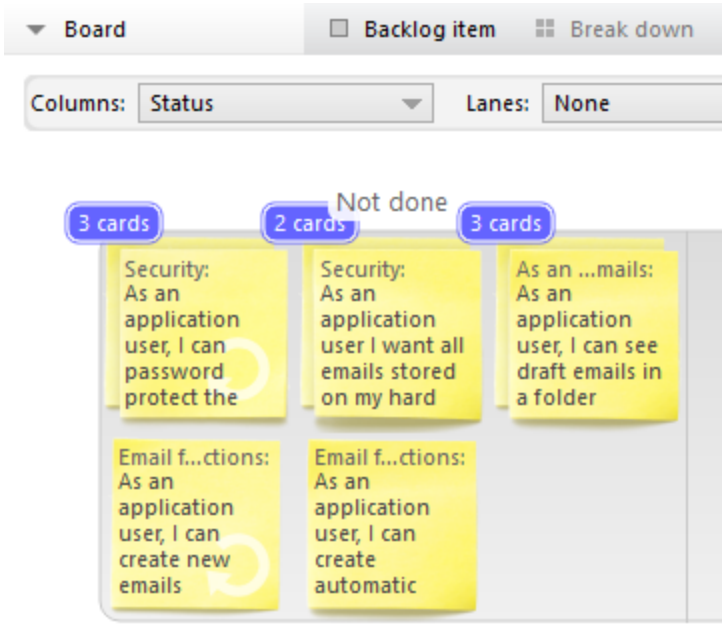
You flag backlog items (both in a sprint and in the backlog) by right clicking and selecting **Flag as user story**:



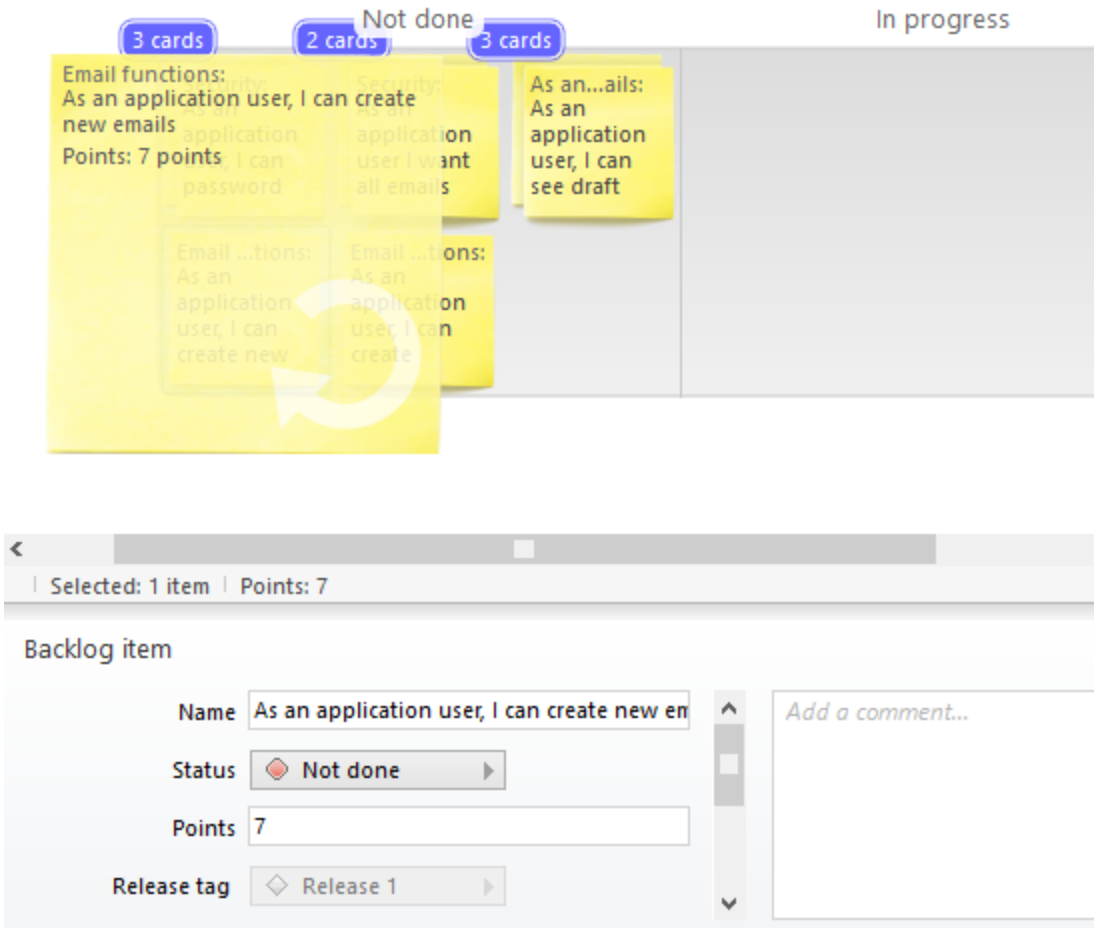
In customize project you have the option to have backlog items (both in the sprint and the backlog) flagged as user stories by default:



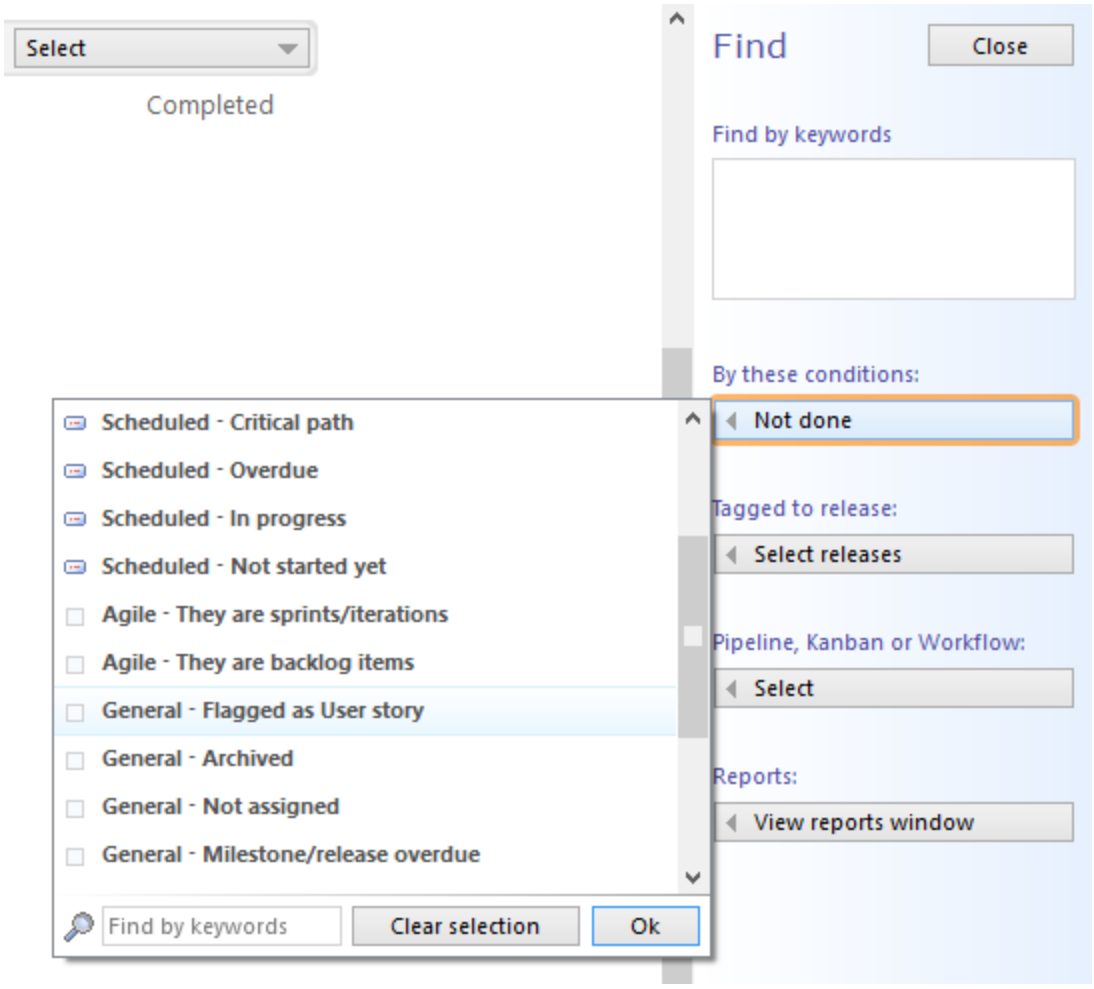
If you open the backlog (Ctrl + D) and select **Board** you can work with user stories on a virtual board:


Board
Backlog item
Break down
Columns:
Status
Lanes:
None
Not done
3 cards
2 cards
3 cards
Security: As an application user, I can password protect the
Security: As an application user I want all emails stored on my hard
As an ...mails: As an application user, I can see draft emails in a folder
Email f...ctions: As an application user, I can create new emails
Email f...ctions: As an application user, I can create automatic

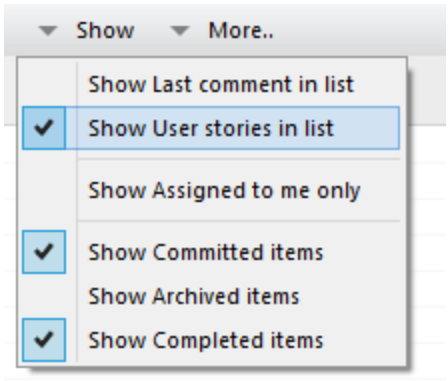
You now have a User story area to write in, in the activity details window at the bottom:



You can find all user stories by opening Find and selecting "General - Flagged as User Stories":

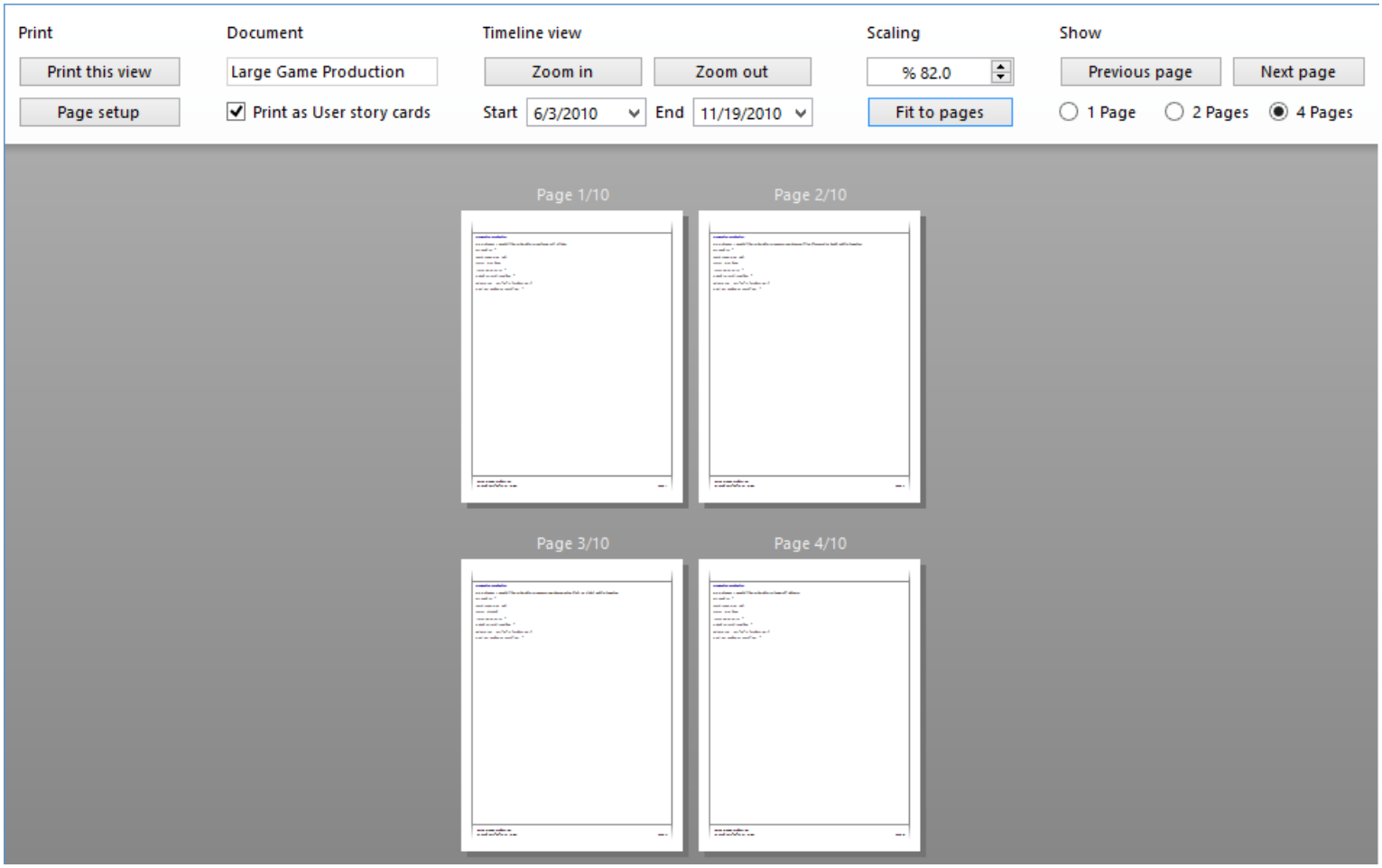


If you go to **Show** on the main toolbar you can choose to show User stories directly in the list:



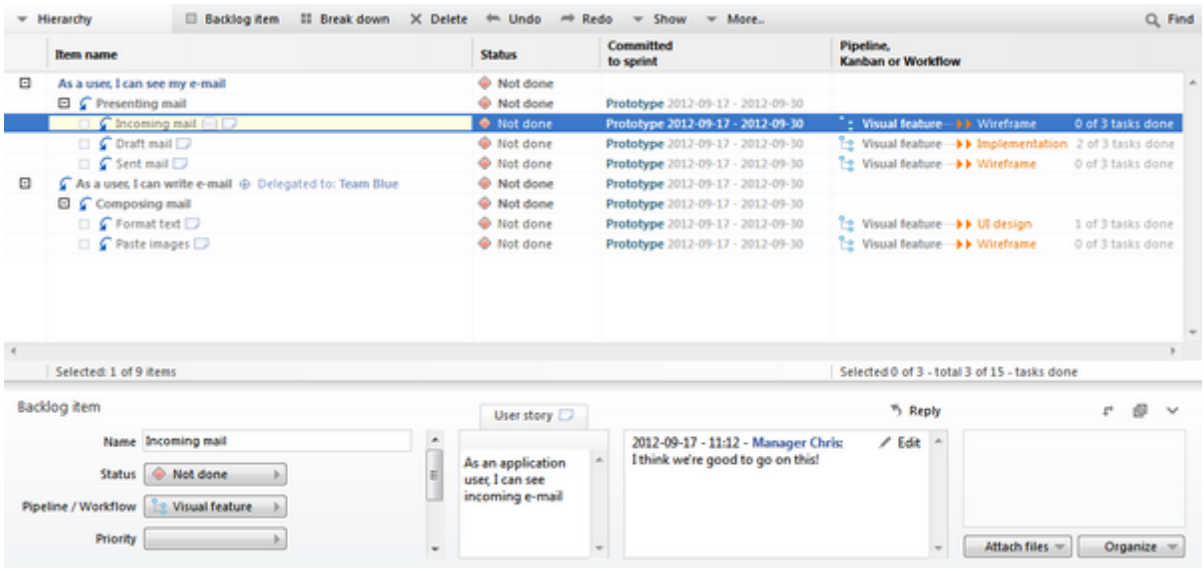
If you first "Find" on all user stories and then open print and click this checkbox you can print user stories as "cards".

Cards will look like this when printed. Data under the item name (like User and Work) is dependent upon which columns are visible (so if you show Estimated effort as a column it will be displayed on the card):



Product Backlog

The backlog



The product backlog of a small agile project

The backlog is the central repository for future work, and is considered an often vital part of an agile project. Items in the backlog can be anything that represents future work -- requirements, bugs, enhancements, feature requests or even scheduled tasks. The work in the backlog is not yet committed to a sprint, and is therefore not considered to currently be worked on. The act of dragging an item from the backlog to a sprint constitutes a commit, at which time it is assigned to a user. Items committed to a sprint have a Backlog icon before the item name, with the committed sprint shown in the "Committed to sprint" column.

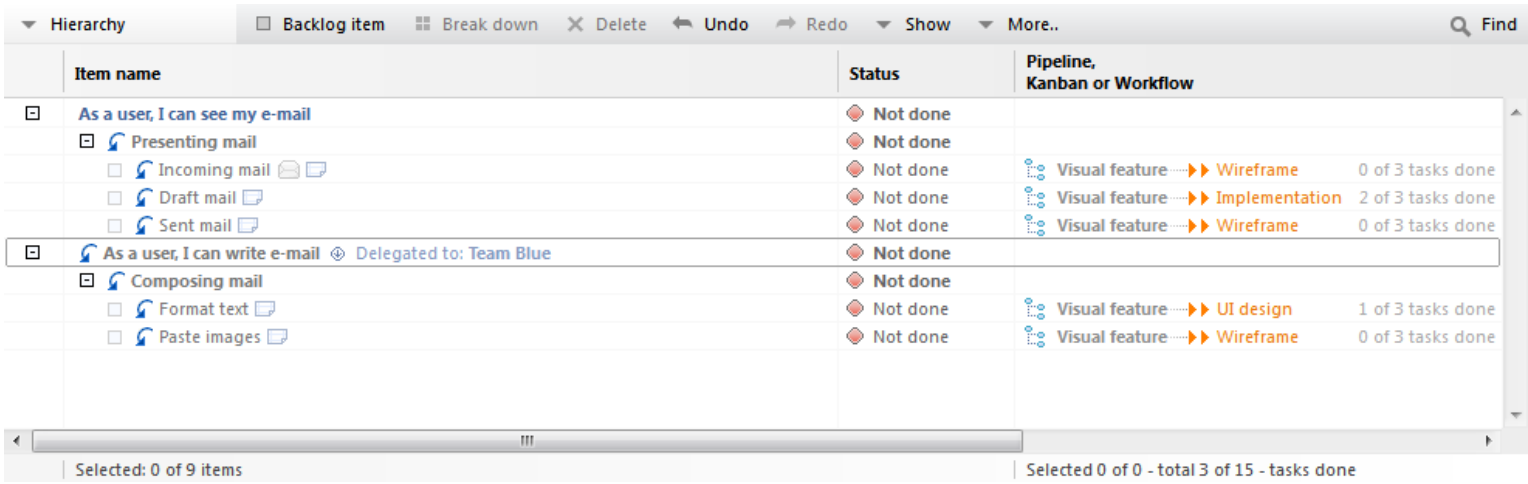
There are three ways of working with items in the backlog: In a hierarchy, on a board or prioritized. Each of these views represents the same information and items.

Tip: The backlog can be configured to use custom columns that cover a large spectrum of agile needs. Please see the customize columns page for more information.

Backlog items in a hierarchy

Items in the project backlog are commonly arranged in a hierarchy that reflects the overarching model of the project. This model is usually determined by how the team, and the product, is structured. Complementing this, parts of the backlog can be delegated to users or user groups. This is indicated by the "Delegated to" label next to a subproject label.

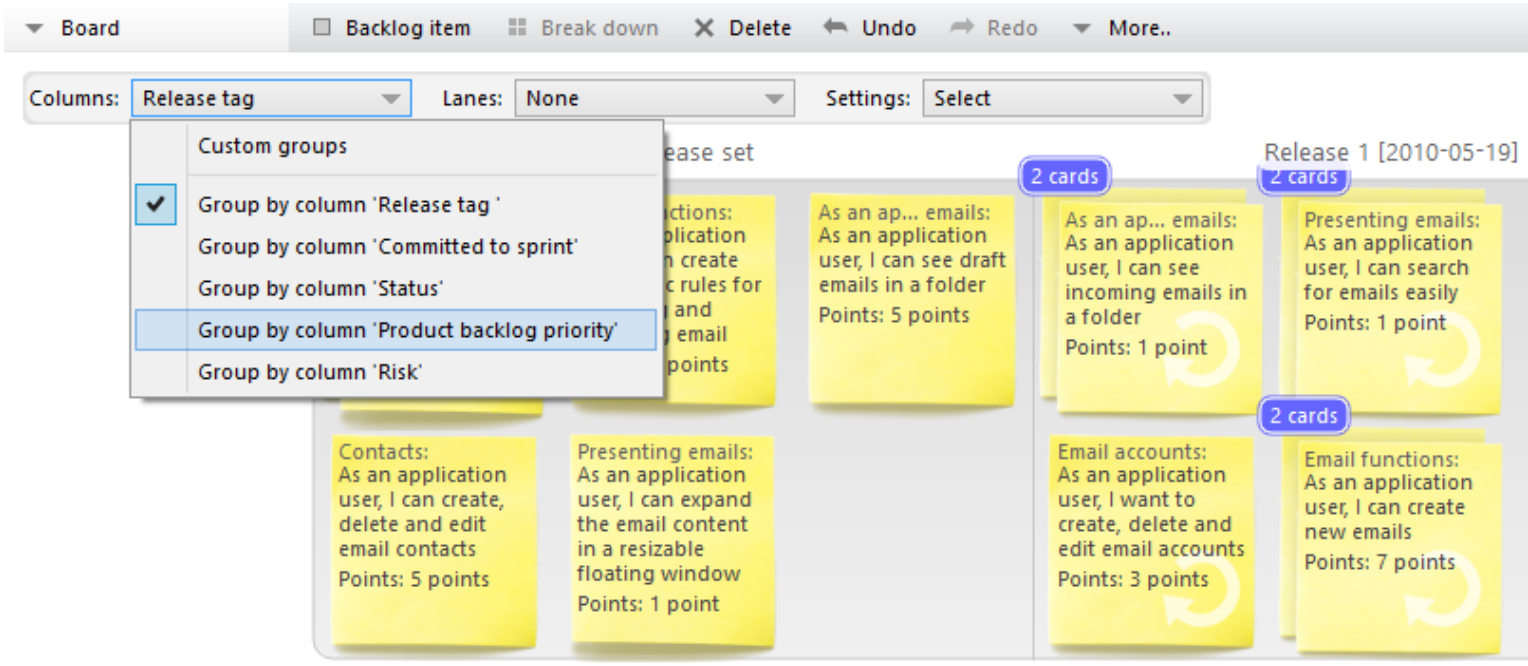
Tip: In addition to the default columns, custom columns can be added that cover a large spectrum of agile needs. Please see the customize columns page for more information.



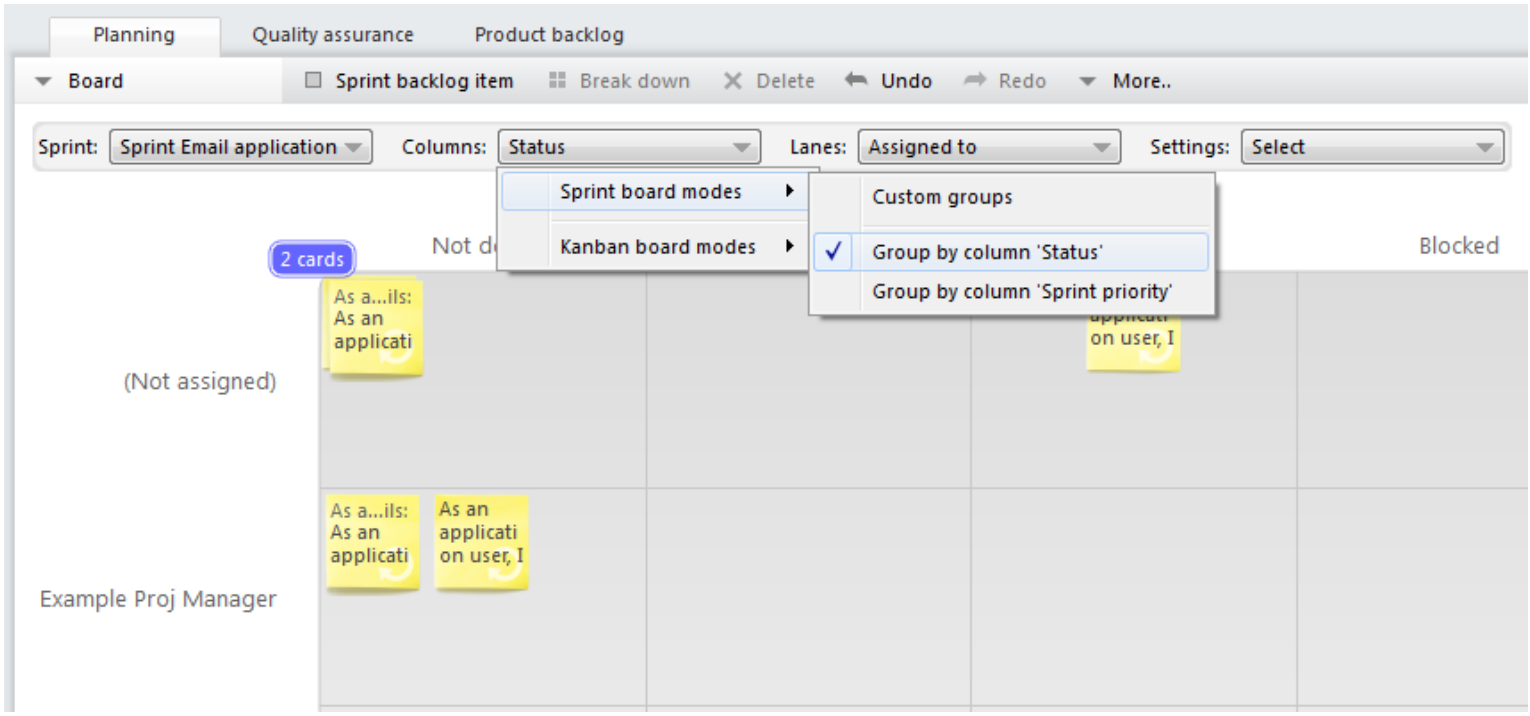
Backlog items on a board

The main goal of this view is to analyze, create and work with items in alternative ways by arranging them on a virtual board. This view is designed to simulate the large physical boards often used in agile projects.

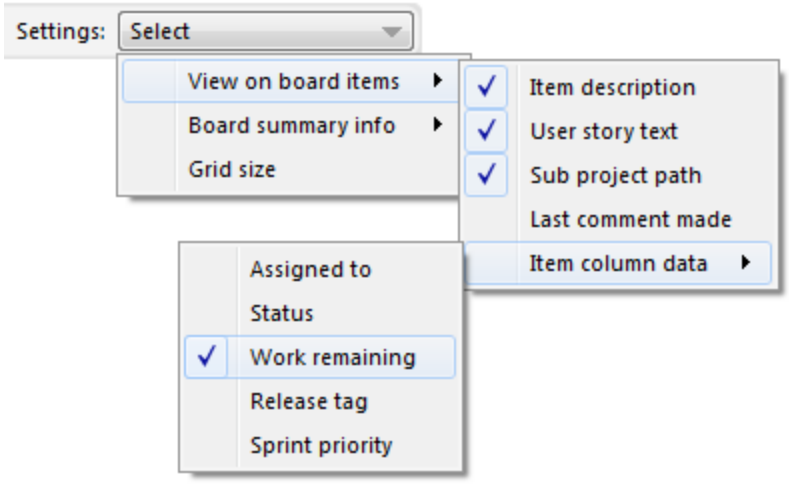
The board can be set to different modes (based on either custom groups or columns) that represent the same information in a variety of different ways:


Board
Backlog item
Break down
Delete
Undo
Redo
More..
Columns:
Release tag
Lanes:
None
Settings:
Select
Custom groups
Group by column 'Release tag '
Group by column 'Committed to sprint'
Group by column 'Status'
Group by column 'Product backlog priority'
Group by column 'Risk'
Release 1 [2010-05-19]
2 cards
As an ap... emails:
As an application user, I can see draft emails in a folder
Points: 5 points
As an ap... emails:
As an application user, I can see incoming emails in a folder
Points: 1 point
Presenting emails:
As an application user, I can search for emails easily
Points: 1 point
Contacts:
As an application user, I can create, delete and edit email contacts
Points: 5 points
Presenting emails:
As an application user, I can expand the email content in a resizable floating window
Points: 1 point
Email accounts:
As an application user, I want to create, delete and edit email accounts
Points: 3 points
Email functions:
As an application user, I can create new emails
Points: 7 points

Moving items in auto group mode will affect the items when dropping them into a new group:

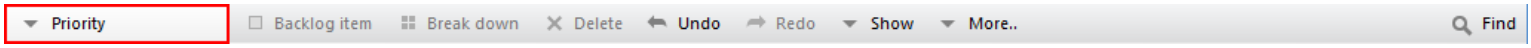


There is a wide range of settings for the board view (information shown on the board items, board summary, and the size of the grid):



Backlog items prioritized

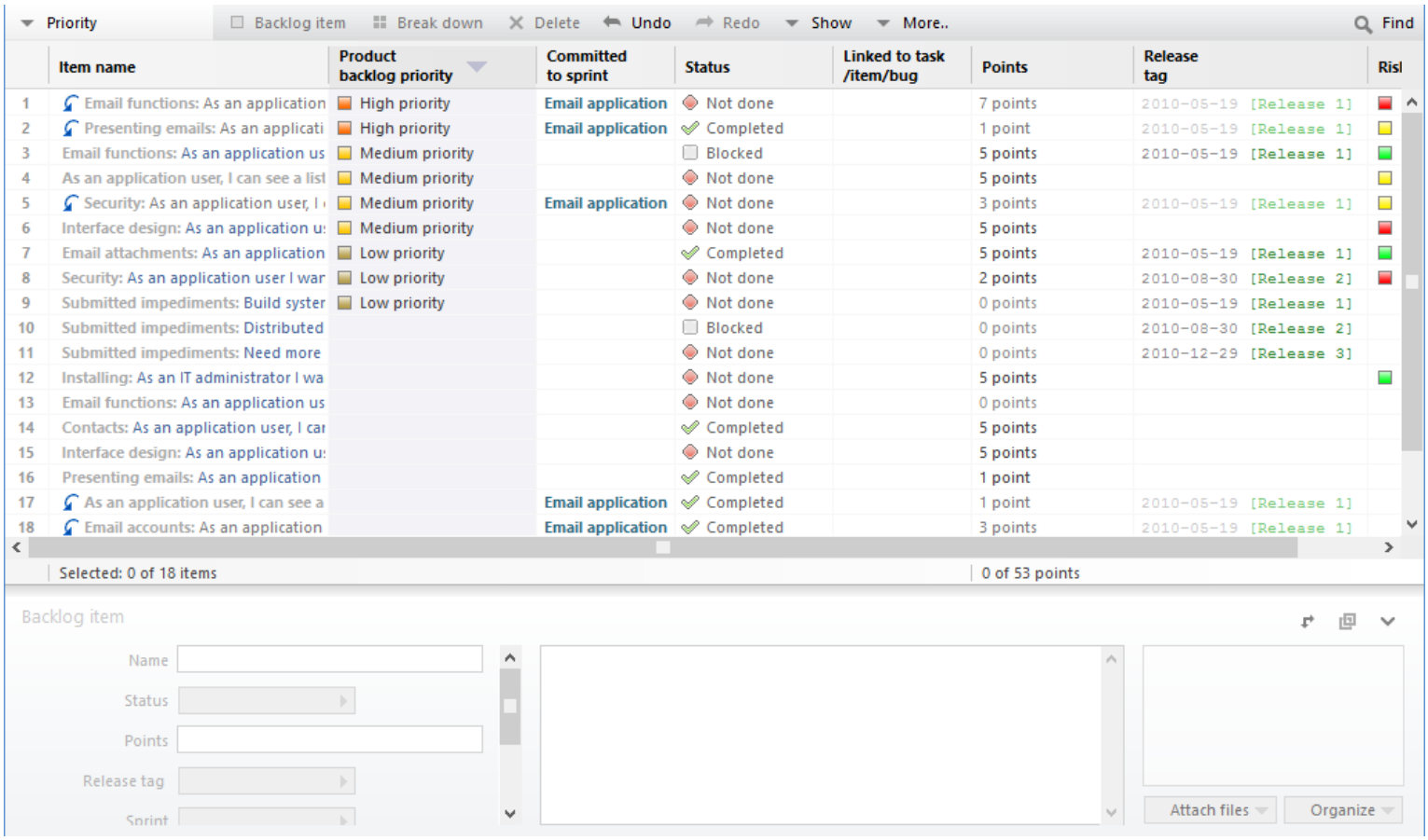
Tip: switching between different view modes(priority/hierarchy etc) is done by clicking the tab next to Backlog item. The tab title will always display the currently selected view mode.

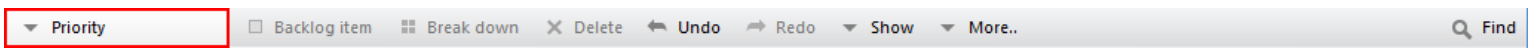


The main goal of this view is to prioritize items on a higher level for the project.

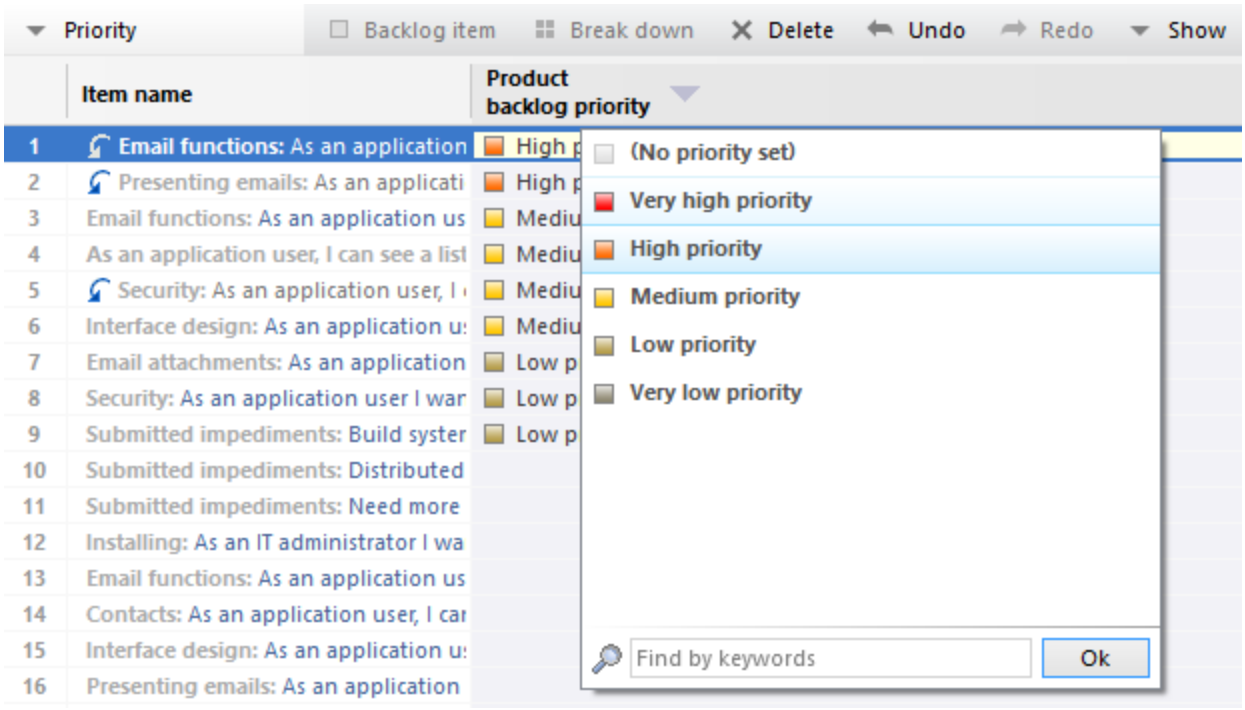
The normal workflow for a backlog item is to enter it (or commit it from the product backlog) into Items in a hierarchy and then prioritize it among all other items in "Items prioritized" (independent of the hierarchy).

You can set priority in "Items prioritized" by either dragging items up or down, or by selecting from "Product backlog priority" column:

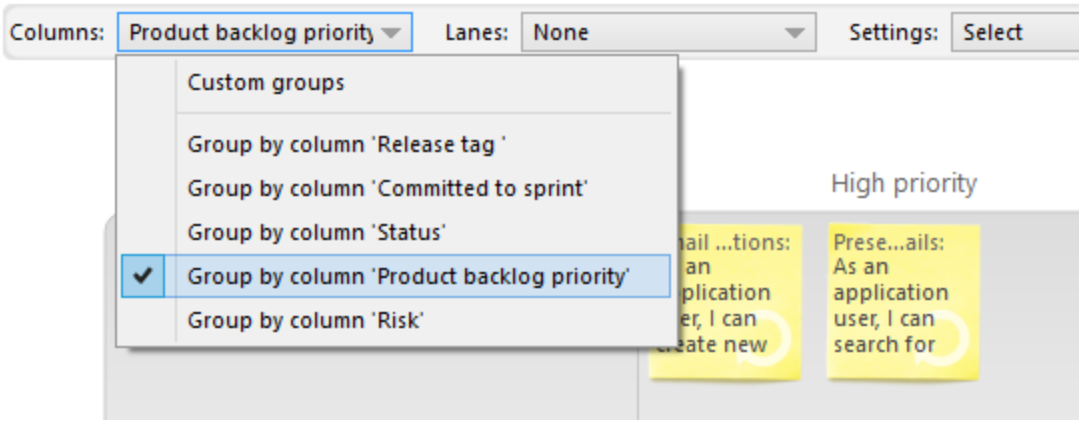

Priority
Backlog item
Break down
Delete
Undo
Redo
Show
More..
Find
Item name
Product backlog priority
Committed to sprint
Status
Linked to task /item/bug
Points
Release tag
Risl
1 Email functions: As an application High priority Email application Not done 7 points 2010-05-19 [Release 1]
2 Presenting emails: As an applicati High priority Email application Completed 1 point 2010-05-19 [Release 1]
3 Email functions: As an application us Medium priority Blocked 5 points 2010-05-19 [Release 1]
4 As an application user, I can see a list Medium priority Not done 5 points
5 Security: As an application user, I Medium priority Email application Not done 3 points 2010-05-19 [Release 1]
6 Interface design: As an application u: Medium priority Not done 5 points
7 Email attachments: As an application Low priority Completed 5 points 2010-05-19 [Release 1]
8 Security: As an application user I war Low priority Not done 2 points 2010-08-30 [Release 2]
9 Submitted impediments: Build syster Low priority Not done 0 points 2010-05-19 [Release 1]
10 Submitted impediments: Distributed Blocked 0 points 2010-08-30 [Release 2]
11 Submitted impediments: Need more Not done 0 points 2010-12-29 [Release 3]
12 Installing: As an IT administrator I wa Not done 5 points
13 Email functions: As an application us Not done 0 points
14 Contacts: As an application user, I car Completed 5 points
15 Interface design: As an application u: Not done 5 points
16 Presenting emails: As an application Completed 1 point
17 As an application user, I can see a Email application Completed 1 point 2010-05-19 [Release 1]
18 Email accounts: As an application Email application Completed 3 points 2010-05-19 [Release 1]
Selected: 0 of 18 items
0 of 53 points
Backlog item
Name
Status
Points
Release tag
Sprint
Attach files
Organize



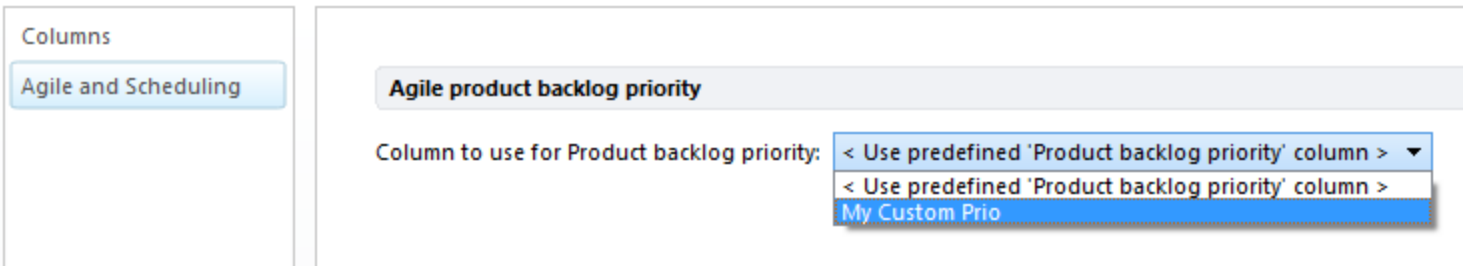
You can set the priority in "Priority view" by selecting from "Product backlog priority" column:


Priority
Backlog item
Break down
Delete
Undo
Redo
Show
Item name
Product backlog priority
1 Email functions: As an application
2 Presenting emails: As an applicati
3 Email functions: As an application us
4 As an application user, I can see a list
5 Security: As an application user, I
6 Interface design: As an application u
7 Email attachments: As an application
8 Security: As an application user I war
9 Submitted impediments: Build syster
10 Submitted impediments: Distributed
11 Submitted impediments: Need more
12 Installing: As an IT administrator I wa
13 Email functions: As an application us
14 Contacts: As an application user, I car
15 Interface design: As an application u
16 Presenting emails: As an application
(No priority set)
Very high priority
High priority
Medium priority
Low priority
Very low priority
Find by keywords
Ok

You can set the priority in "Board view" by selecting "Product backlog priority" as your board mode:



You can select a custom drop list column as your Product backlog priority by going in to "Customize project" and then "Priority":

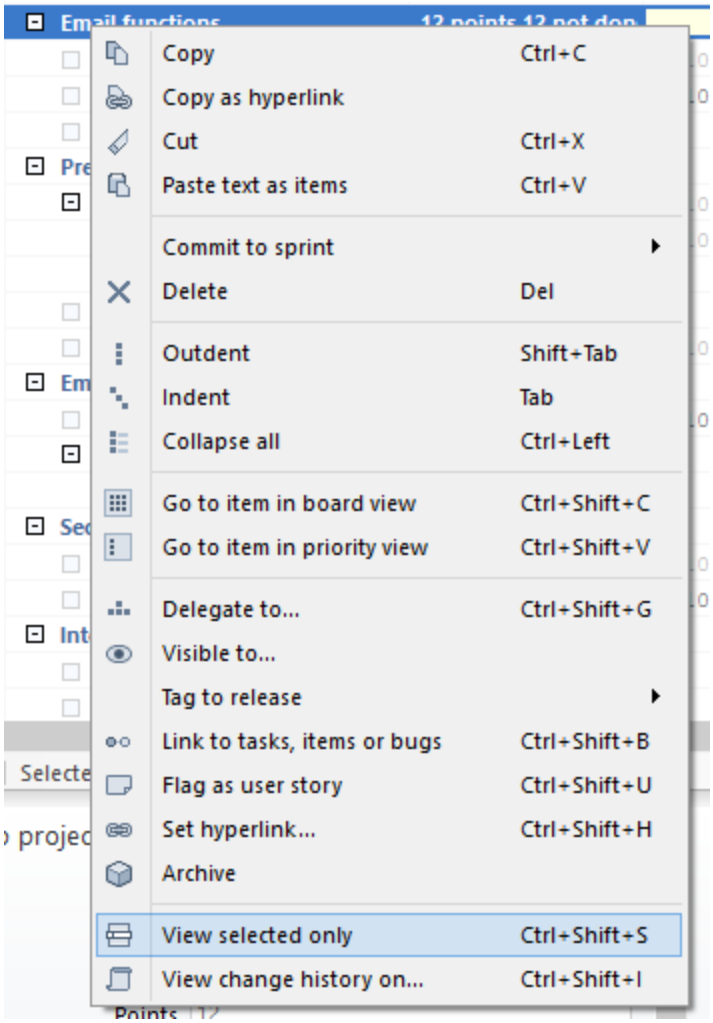


Prioritizing a part of the backlog

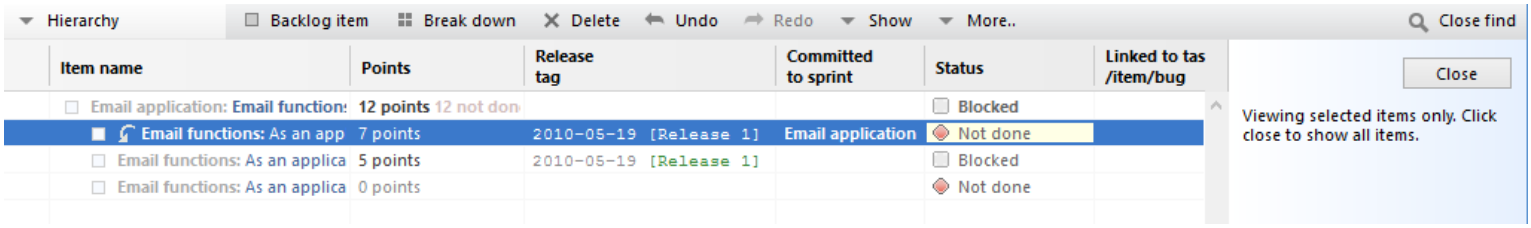
One important feature for doing true enterprise backlog management is to be able to prioritize a part of it (independent from other parts).

This is often the case when you have multiple product owners within the same large project.

Start with going to items in a hierarchy, right-click a sub project and select **View selected only**:



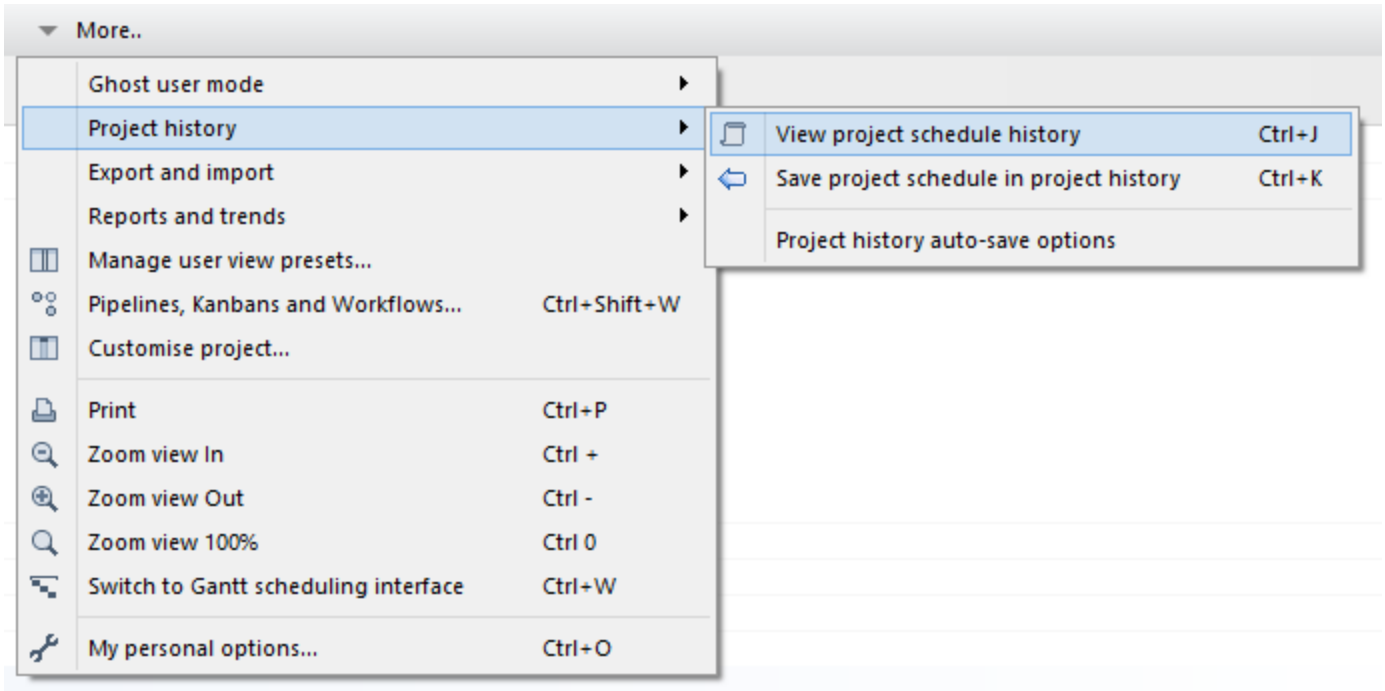
Now, go to "Items prioritized" and select priority from the column:



Backlog History

As with the main planning view, you can also review the history for the product backlog. As an example, this can be important when looking at which items have been added or deleted, or when comparing current requirements with those at the starting phase of the project.

You access the backlog history in the **More..** menu and then View product backlog history. The keyboard shortcut is Ctrl + J, or Cmd + J.



If there is a difference between the historic version and the current, it is marked in violet, as seen below:

Email application - Prototype 2010-03-29 - 2010-04-23
Sprint backlog items
As an application user, I want to create, delete and edit email accounts
As an application user, I can see a list of all my emails
As an application user, I can password protect the application so no other user can access it
As an application user, I can search for emails easily > As an application user I want to be able to search for emails easily

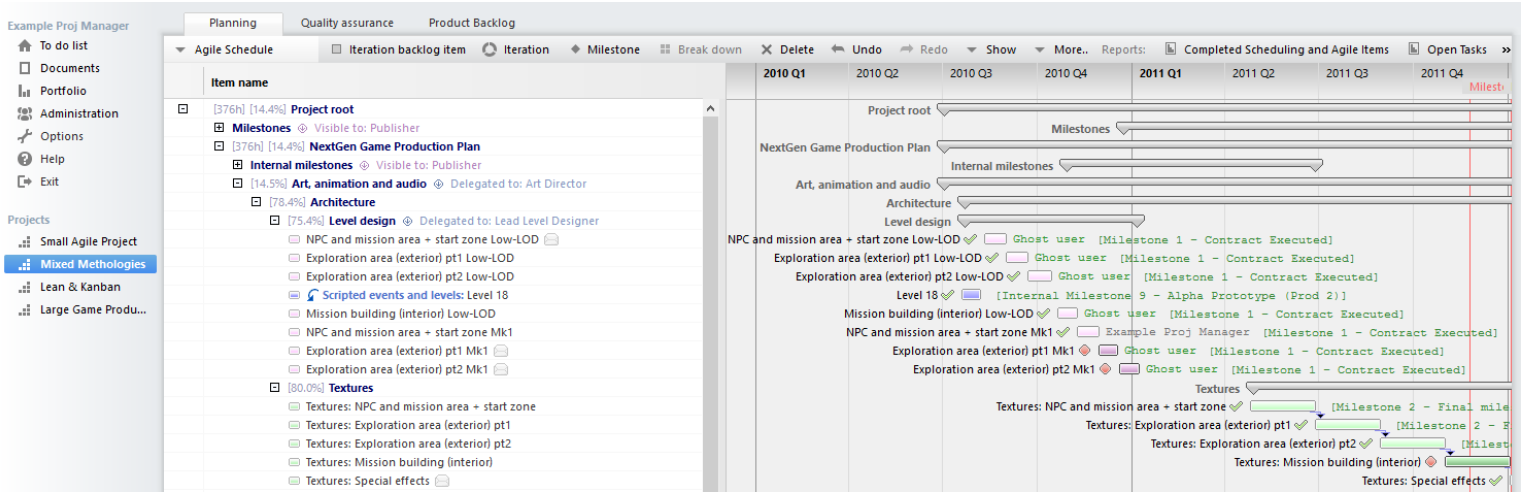
Task scheduling projects

Getting started with scheduling

Each project has a timeline view where the activities (tasks and releases) you create will be listed on the left and visualized on the right. Above the timeline view is the main main toolbar and beneath it is the Activities details window.

From Hansoft 5.3 and onwards you commit items from the product backlog to a schedule. This is very useful because features can be listed, categorized and analyzed in the product backlog and then planned out in the planning view. Read more about using the product backlog in scheduling projects here.

An example of a scheduled task in a project:



Tip: After you have read this page, start with inserting tasks.

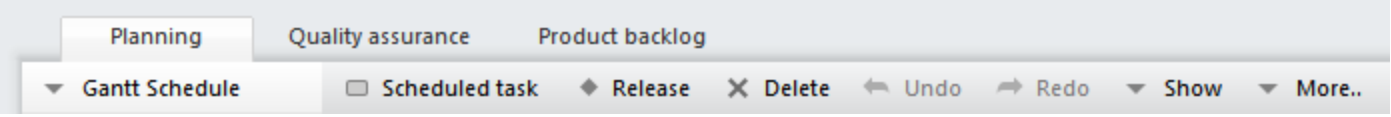
Two important things to have in mind when making the project plan:

·When you are making a project plan and assign tasks to users or change anything, it will have an immediate effect to all users connected to the project server.

·The project can have several project managers, each with his/her own project plan. If you want to co-ordinate between several project managers in the same project, Hansoft recommends the Portfolio allocations tool. This is covered in the Portfolio allocations section of this help manual.

Inserting and deleting activities

This section covers how to insert and delete activities. Activities are objects inserted in the timeline view such as tasks and releases.



The toolbar for working in Scheduled mode

Tip: When you are finished inserting tasks and releases, proceed to set the name, start, finish and duration.

Inserting a task

Inserting a task is done by clicking the **Scheduled task** button on the main timeline toolbar, or by pressing Ctrl + N (Cmd + N). The task will be inserted after the currently selected item.

Inserting a release

You insert a release (also referred to as a release) by clicking the **Release** button on the toolbar, or by pressing Ctrl + M (Cmd + M). The release will be inserted after the currently selected item.

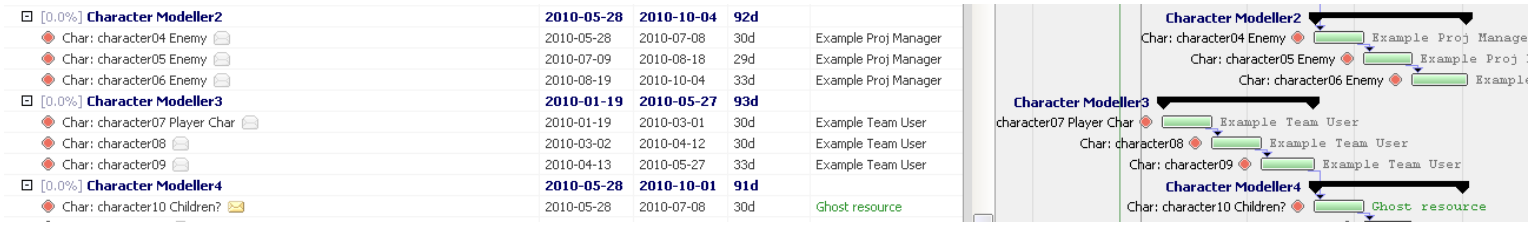
Deleting an item

Deleting items can be done either by clicking the **Delete** button, by pressing the Delete key, or by right-clicking the intended item and selectind Delete.

Setting basic activity properties

Changing Task properties

The activity list allows for basic manipulation of task name, start and finish dates, duration and the users allocated to a task.


[0.0%] Character Modeller2 2010-05-28 2010-10-04 92d
Char: character04 Enemy 2010-05-28 2010-07-08 30d Example Proj Manager
Char: character05 Enemy 2010-07-09 2010-08-18 29d Example Proj Manager
Char: character06 Enemy 2010-08-19 2010-10-04 33d Example Proj Manager
[0.0%] Character Modeller3 2010-01-19 2010-05-27 93d
Char: character07 Player Char 2010-01-19 2010-03-01 30d Example Team User
Char: character08 2010-03-02 2010-04-12 30d Example Team User
Char: character09 2010-04-13 2010-05-27 33d Example Team User
[0.0%] Character Modeller4 2010-05-28 2010-10-01 91d
Char: character10 Children? 2010-05-28 2010-07-08 30d Ghost resource
Character Modeller2
Char: character04 Enemy
Char: character05 Enemy
Char: character06 Enemy
Character Modeller3
character07 Player Char
Char: character08
Char: character09
Character Modeller4
Char: character10 Children?
Ghost resource

Note: The picture above shows a snapshot from an activity list when using the "Fixed duration" project method. The differences between the two project methods are covered in the Fixed work and fixed duration section of this manual.

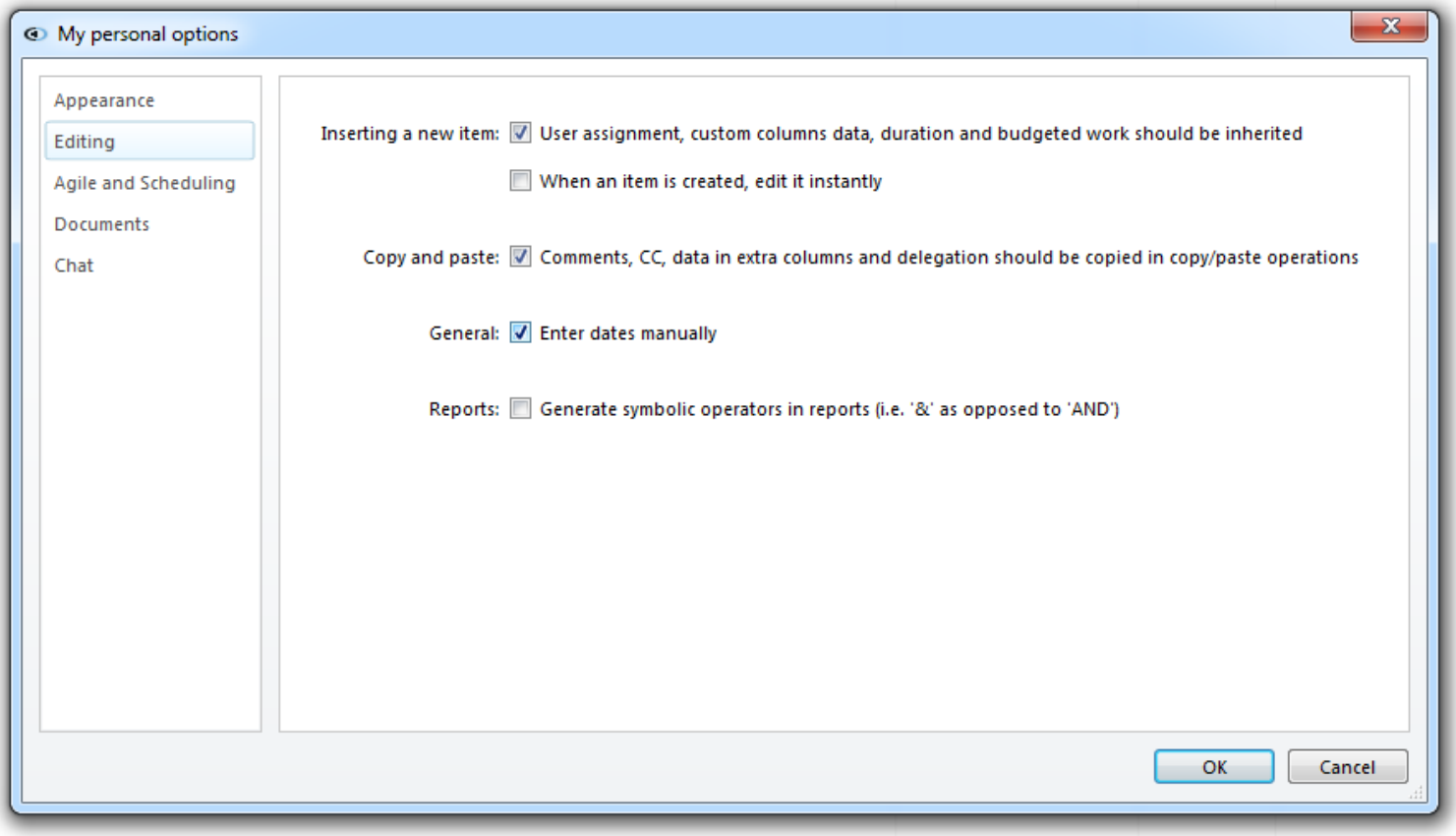
Tip: Proceed to the Working with the timeline view section of this help manual to learn more about working with visualized activities.

Changing the activity name

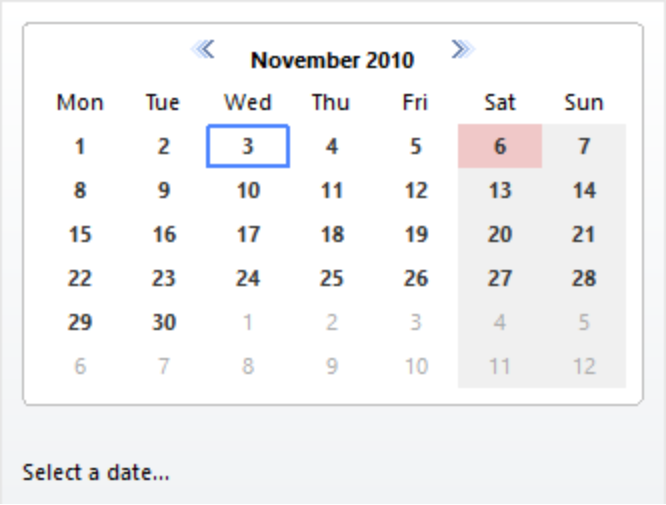
Double-click on a task in the "activity name" column and write or change the name of the task. You can also change the activity name in the activity details window, located below the timeline list.

Setting the start or finish date

Double clicking on a date allows it to be set. How dates are entered is selected in **Editing>My personal options**.


My personal options
Appearance
Editing
Agile and Scheduling
Documents
Chat
Inserting a new item:
User assignment, custom columns data, duration and budgeted work should be inherited
When an item is created, edit it instantly
Copy and paste:
Comments, CC, data in extra columns and delegation should be copied in copy/paste operations
General:
Enter dates manually
Reports:
Generate symbolic operators in reports (i.e. '&' as opposed to 'AND')
OK
Cancel

With the Enter dated manually unselected a calendar selector is used for entering dates.



White-colored days indicate working days, gray days are free, and red-colored days indicate holidays. Change the calendar month by clicking on the blue arrows on either side of the month title.

You can also change start and end dates by simply dragging the edges of the task in the timeline view. This is covered in the Working with the timeline view section of this help manual.

Changing the duration of a task

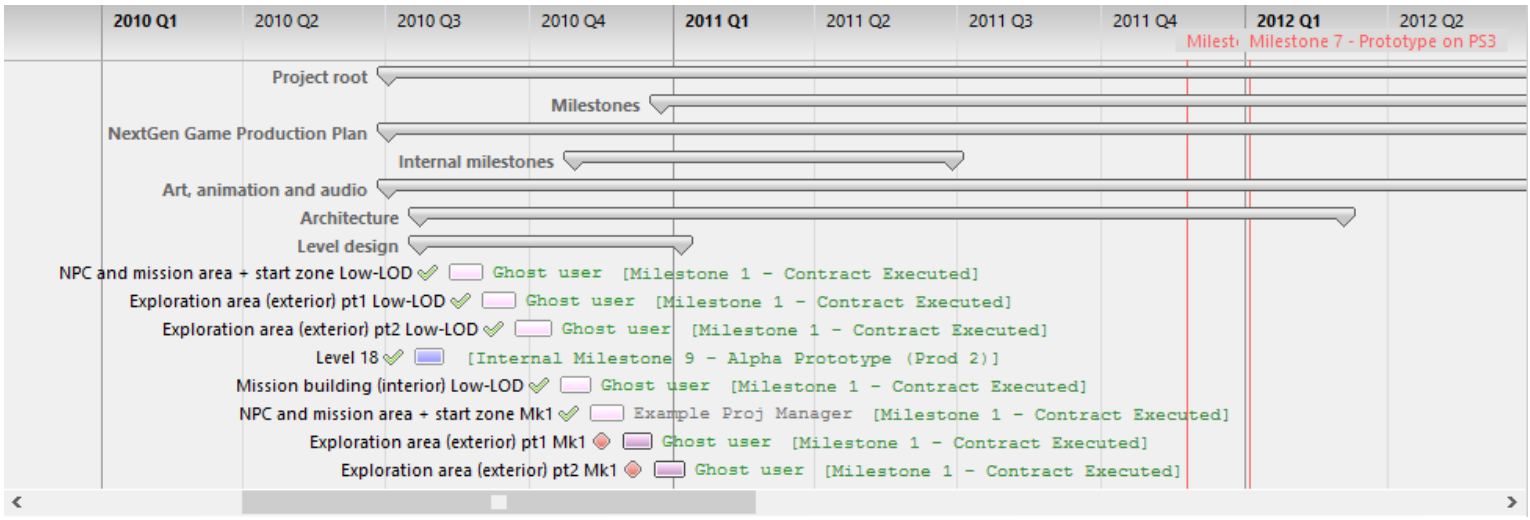
You can change the duration of a task by double-clicking on the task in the "duration" column. The duration of the task is specified in whole days or in hours. You can "pack" a number of smaller activities into the schedule by giving them short durations (Example: 2 hours).Use Arrange task (Ctrl + Shift + A, or Cmd + Shift + A) or connect tasks to align and pack them.

Note 1: Changing the duration of a task automatically affects the finish date.

Note 2: When working with the "Fixed work" method, the duration of a task is specified by the assigned user and the budgeted work hours. This is covered further in the "Fixed work and fixed duration" section.

Working with the timeline view

The timeline view is a cornerstone in visualizing and editing activities and the connections between them. This is an introduction to the most important aspects of the timeline view.



Changing the position of the time scale

Hansoft recommends that you use the right mouse button and click in the view when you are not hovering above an activity, dragging the time scale along with your mouse. This is the quickest and most effective way to navigate.

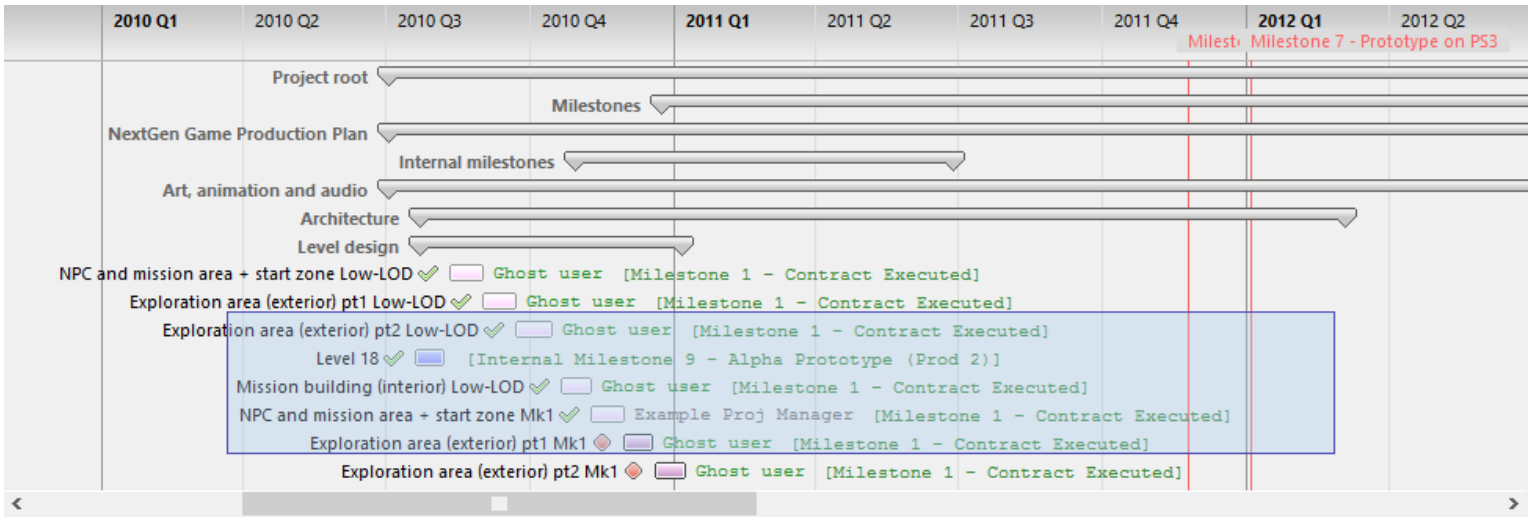
You can also use the horizontal scroll bar located below the timeline view. According to the timescale the earliest task begins when the scroll bar is at the far left. When the scroll bar is at the far right, it means that this is when the latest task ends according to the time scale.

Zooming in and out the time scale

You can either click the **Zoom in** and **Zoom out** buttons located in the main timeline toolbar or use the mouse scroll wheel while pressing the Ctrl button on the keyboard (Cmd button on OSX).

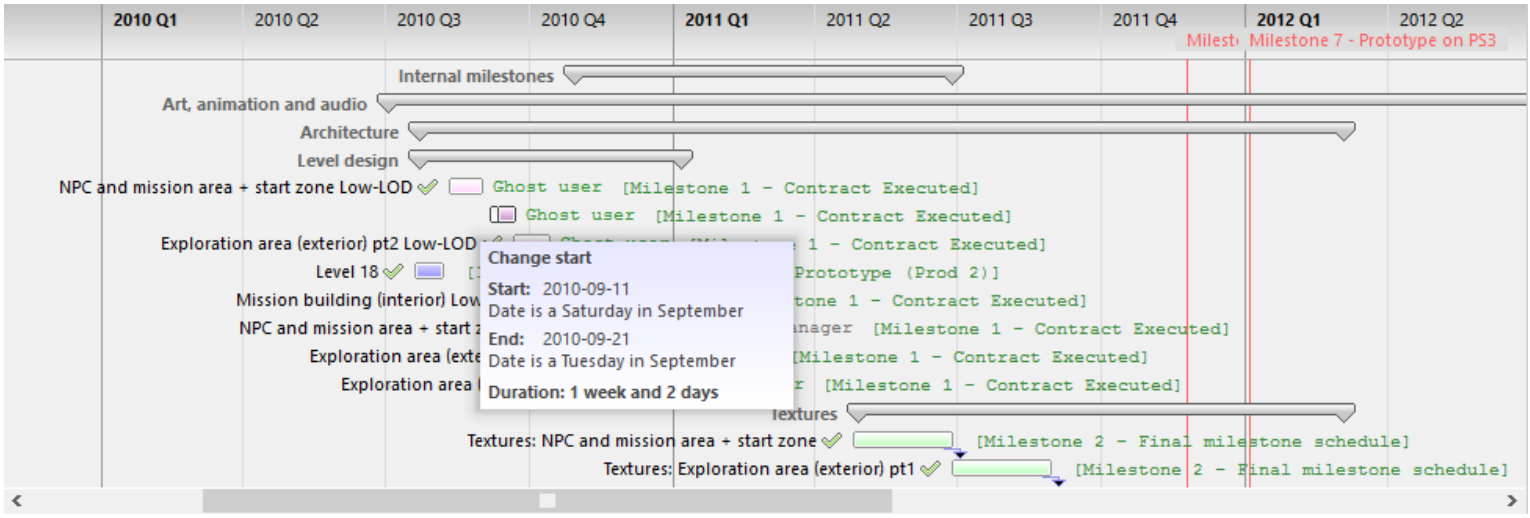
Time box selecting

Use left mouse button and drag across the timeline view.


2010 Q1
2010 Q2
2010 Q3
2010 Q4
2011 Q1
2011 Q2
2011 Q3
2011 Q4
2012 Q1
2012 Q2
Milest
Milestone 7 - Prototype on PS3
Project root
Milestones
NextGen Game Production Plan
Internal milestones
Art, animation and audio
Architecture
Level design
NPC and mission area + start zone Low-LOD
Ghost user [Milestone 1 - Contract Executed]
Exploration area (exterior) pt1 Low-LOD
Ghost user [Milestone 1 - Contract Executed]
Exploration area (exterior) pt2 Low-LOD
Ghost user [Milestone 1 - Contract Executed]
Level 18
[Internal Milestone 9 - Alpha Prototype (Prod 2)]
Mission building (interior) Low-LOD
Ghost user [Milestone 1 - Contract Executed]
NPC and mission area + start zone Mk1
Example Proj Manager [Milestone 1 - Contract Executed]
Exploration area (exterior) pt1 Mk1
Ghost user [Milestone 1 - Contract Executed]
Exploration area (exterior) pt2 Mk1
Ghost user [Milestone 1 - Contract Executed]

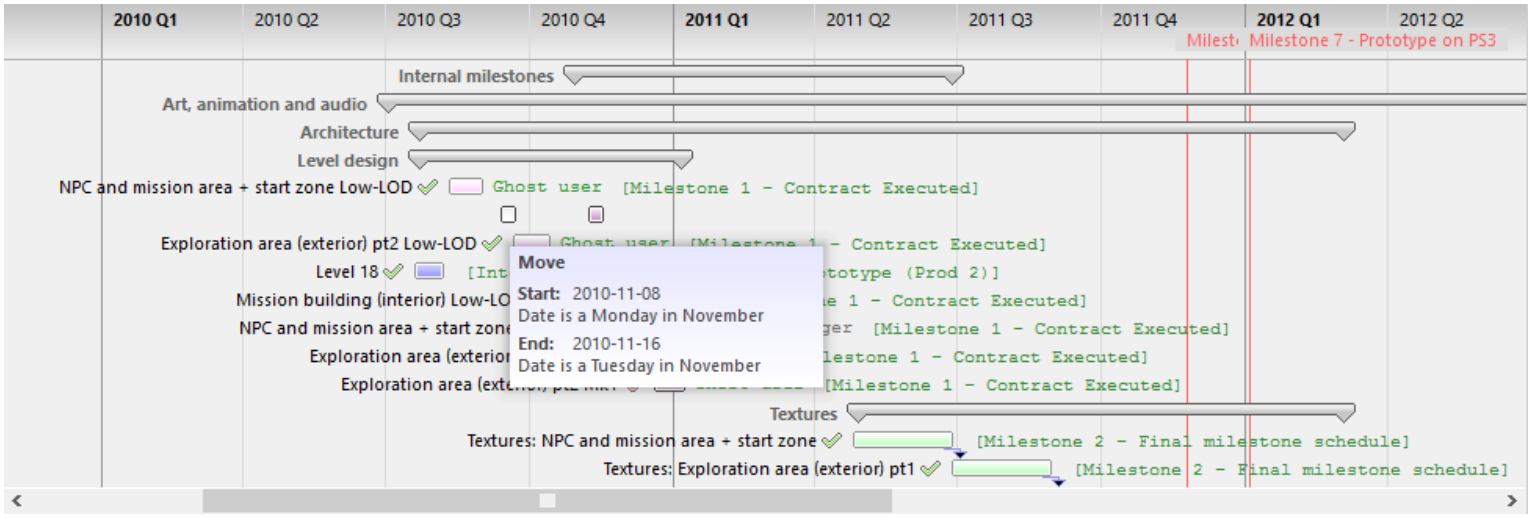
Changing the start or end date of a task

Change the position of the mouse to the far left or right of the task and then press the left mouse button. The information window will give you specific details on the change and how it will affect the task.



Moving an activity

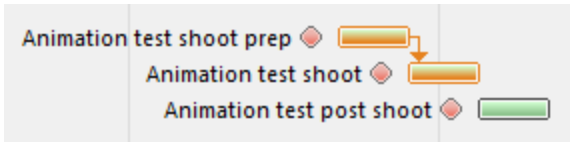
You can move an activity (both tasks and releases can be moved) by moving the mouse to the middle of the task or activity and pressing the left mouse button.



Connecting activities

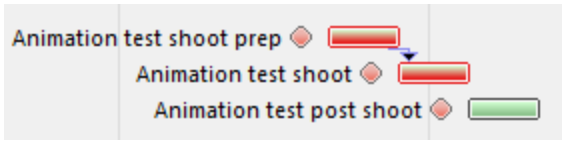
A cornerstone in the project planning is to set logical dependencies (referred to here as connections) between activities. This is an easy (and sometimes fundamental) way to work with large portions of the plan without moving every single task every time.

You can connect two activities by pressing the left mouse button on an activity, moving the mouse to another activity, and then releasing the mouse button. The action is indicated by an orange arrow and orange colored activities.



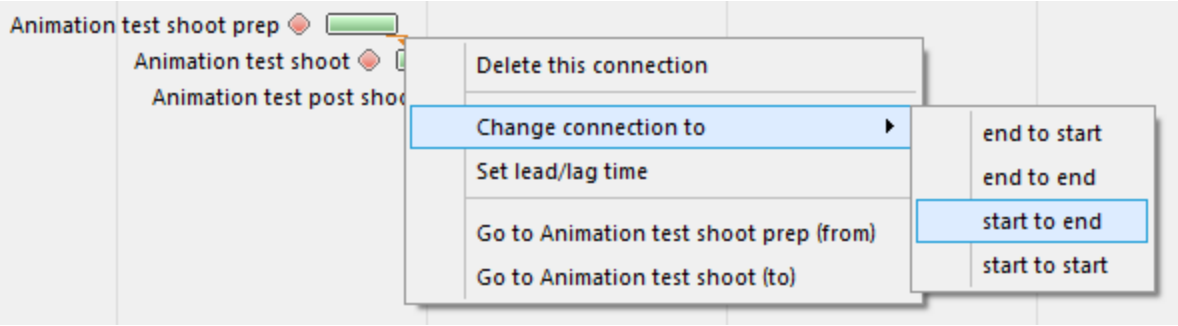
The activity you disconnected from (the first) now affects the activity you connect to (the second). The start date of the second activity will now always be later than the end date of the first activity.

You can not create illegal dependencies:



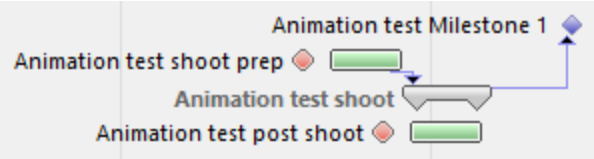
A blinking red arrow along with red colored activities indicate that the connection you are about to make is impossible.

You can configure the connection by clicking on it with the right mouse button:



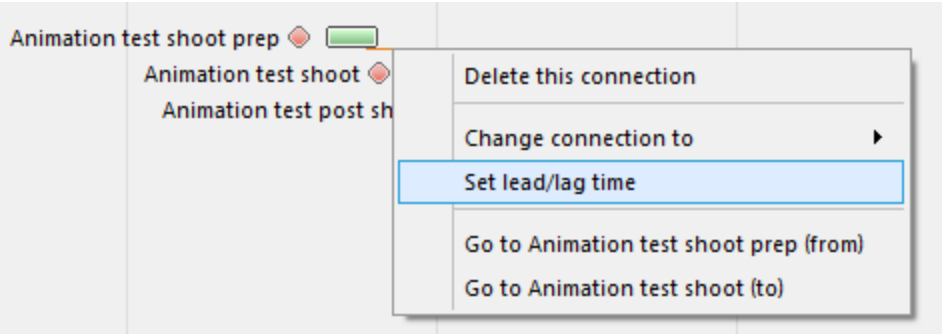
When you connect two activities, the end date of the first task affects the start date of the second task. This is referred to as an "end to start" connection. This can be changed to other types of logical dependencies that work in the same way. Select the type of connection that suits you best.

You can also connect summary activities to activities and vice versa:



More about summary activities is located in the "Indenting tasks and summary activities" section of this help manual.

You can set the lead/lag time on a connection by right clicking on the connection and selecting **Set lead/lag time**:

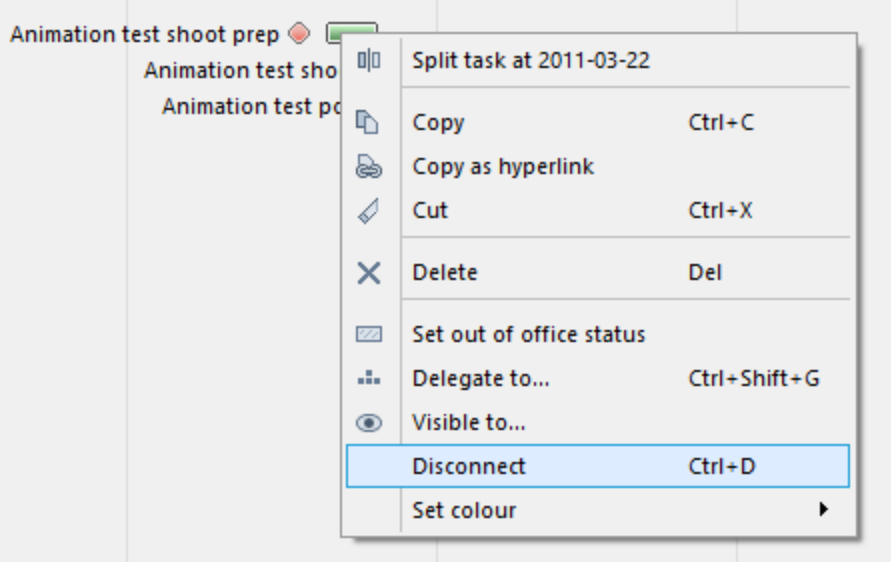

Animation test shoot prep
Animation test shoot
Animation test post sh
Delete this connection
Change connection to
Set lead/lag time
Go to Animation test shoot prep (from)
Go to Animation test shoot (to)

Deleting connections

Right click on the connection and select **Delete this connection** from the menu.

The activity menu

If you click the right mouse button on an activity in the timeline view, a menu will pop up:



You can now perform the following actions:

·You can split up a task into two or more parts. This can,for example, be useful when you have a task with long duration and you have to make room for out of office.

·Cut deletes and copies the activity to the Hansoft Project Manager clipboard and to the Windows clipboard as raw text information.

·Copy simply copies the activity to the Hansoft Project manager clipboard, and to the Windows clipboard as raw text information.

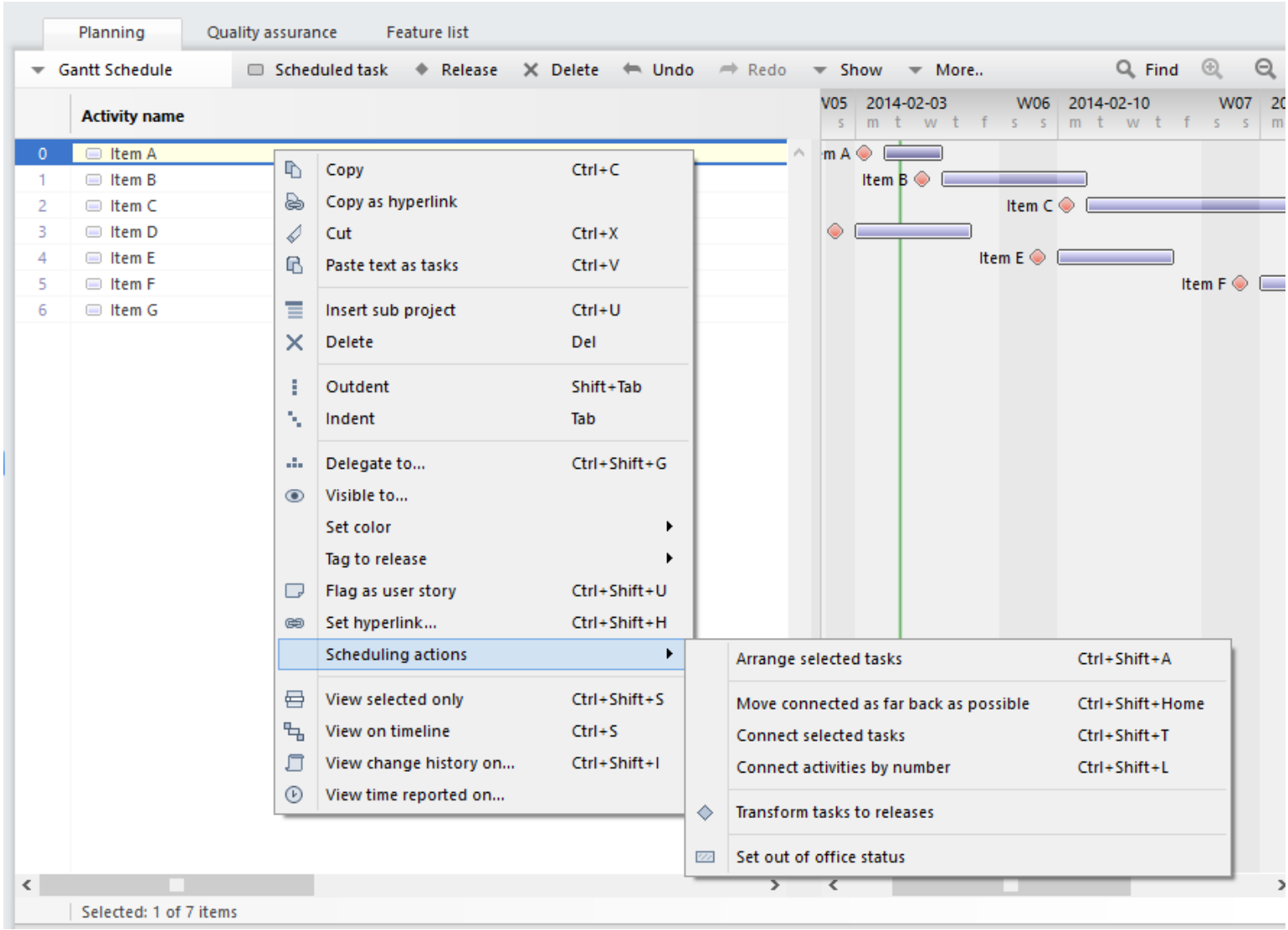
·Delete deletes the activity.

·Disconnect removes all connections to and from the activity.

·Set color sets the color of the activity

·Please Note: All actions can be undone.

Scheduling actions



You can find these actions by right-clicking a scheduled task.

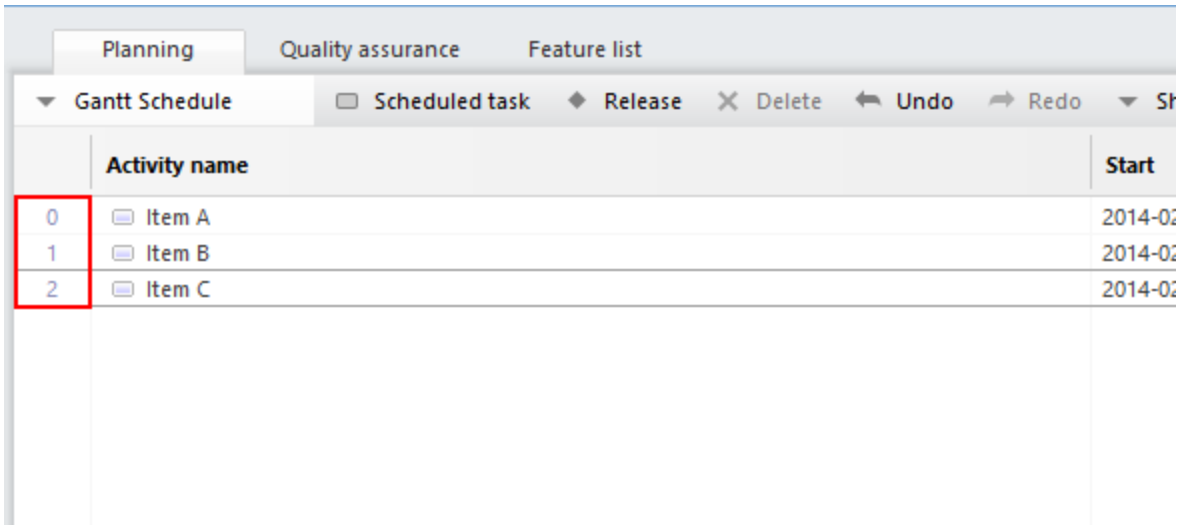
- Arrange selected tasks
- Move connected as far back as possible
- Connect selected tasks
- Connect activities by number
- Transform task to releases
- Set out of office status

Arrange selected task

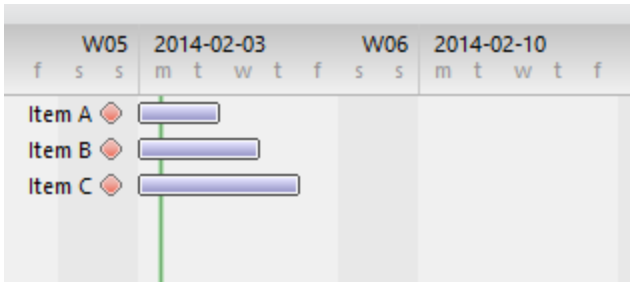
Will arrange the scheduled tasks on the timeline according to their activity number.

Note that in order to see the activity numbers you need to activate the activity number column in **More>My personal options...>Agile and scheduling**.

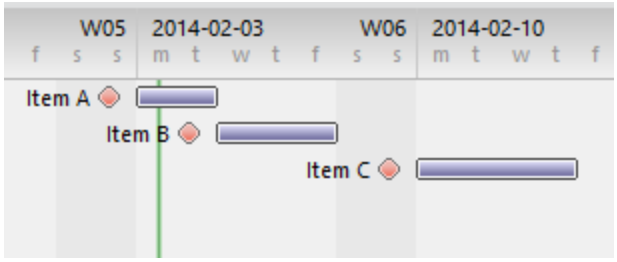
The activity number can then be found in the left most column of the planning view.



All items will receive an activity number depending on their position in the planning view. The first item will receive the activity number 0, the second item will receive the number 1 and so on.



Three items in their default position after being created.

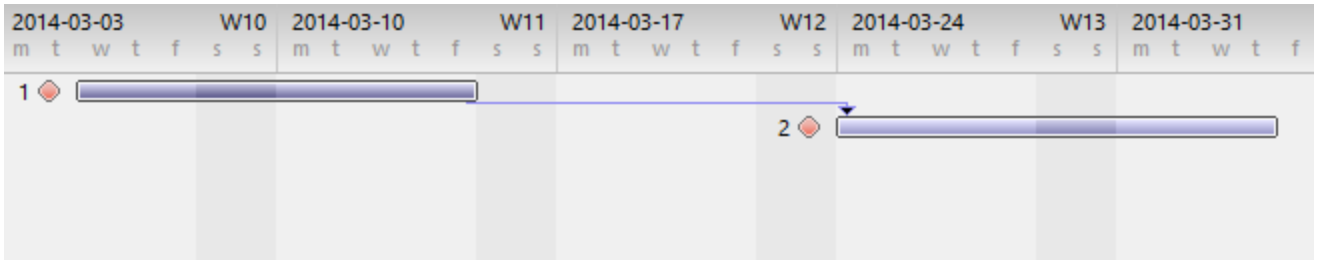


The same three items after using **Arrange selected tasks**.

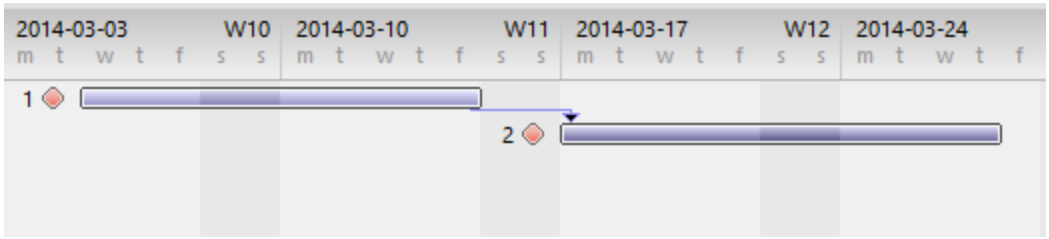
Move connected as far back as possible

Will move the selected connected task as far back as possible. It will not be moved past its predecessor task.

The timeline in Hansoft can stretch to accommodate tasks set to be completed in the distant future. As this causes practical problems when planning the **Move connected as far back as possible** function is intended to act as a "fail-safe". Note that this feature should be used sparingly as it strains the system and hampers Hansoft client performance.



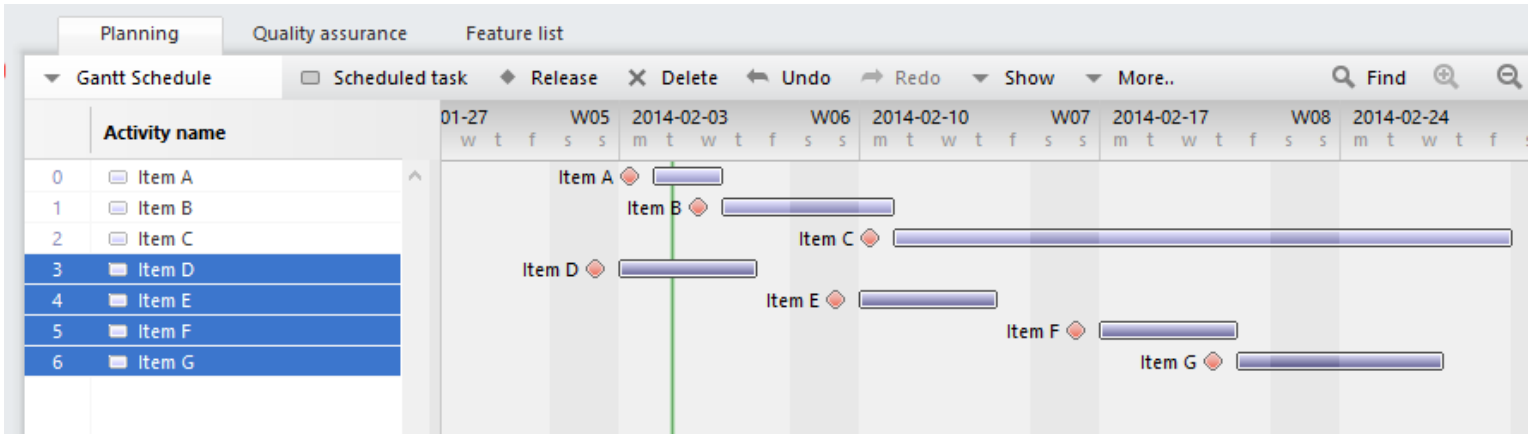
A timeline containing two tasks. There is a one week gap between the finish date of task 1 and the start date of task 2.



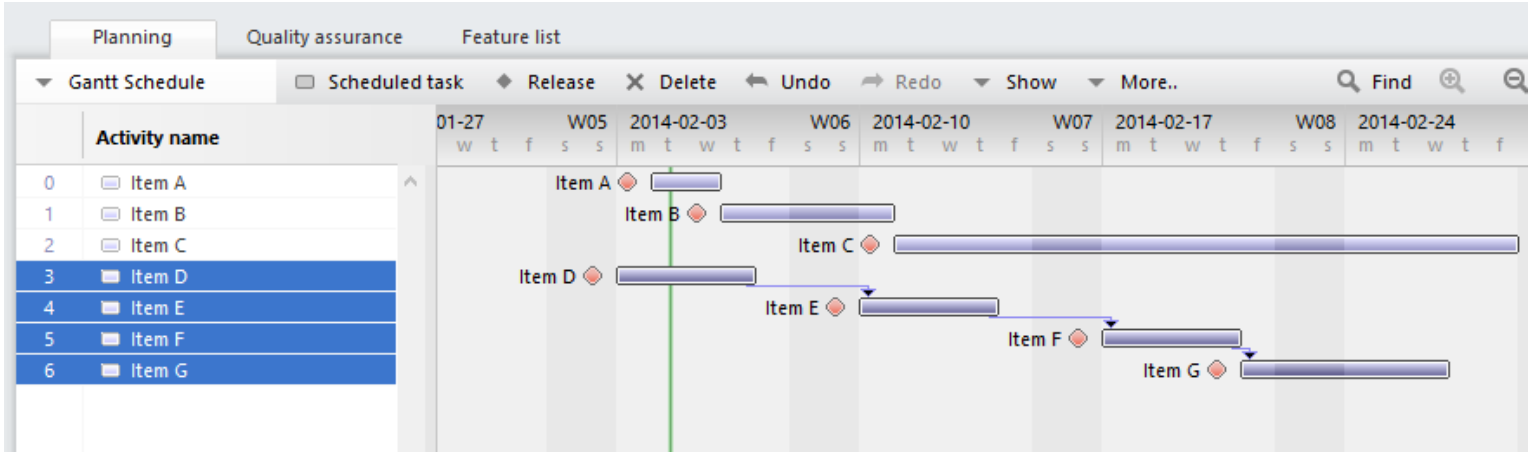
By using **Move connected as far back as possible** you can minimize the gap

Connect selected tasks

Will connect all tasks that have been selected.



This is effective when connecting several scheduled tasks into a larger sequence. Items D,E,F and G have been selected in this example.

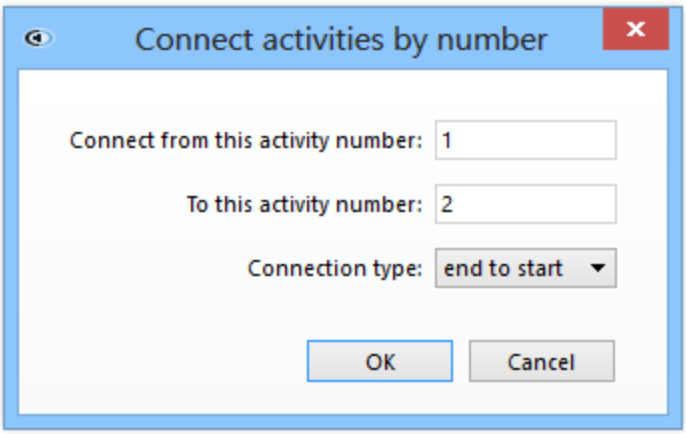


Pressing **Connect selected tasks** connects all of the selected items.

Connect activities by number

will connect tasks by their activity number. This becomes very useful when handling a large amount of scheduled tasks as it does not require you to search through the timeline in order to set connections.

Note that in order to see the activity number you need to activate the activity number column in **More>My personal options...>Agile and scheduling**.



In this image the task associated with the activity number 1 is being connected with the task associated with the activity number 2. The connection will link the end of the first task with the start of the second one. The connection type can be set to several different alternatives.

Transform tasks to releases

Will convert a scheduled task into a release and place it on the finishing date of the late task. You can read more about releases here.

Set out of office status

Will set a scheduled task to out of office status. You can read more about out of office status here.

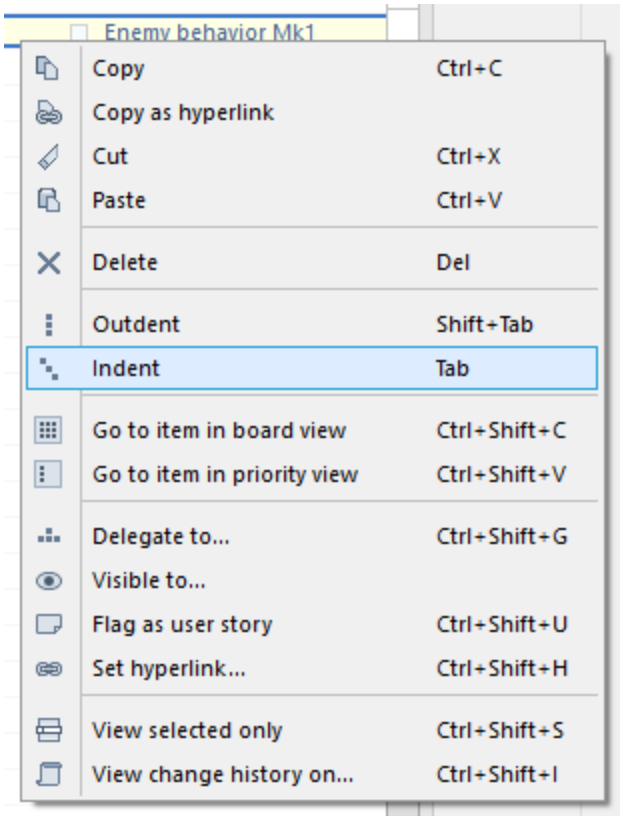
Indent, outdent and summary activities

A corner stone in arranging the activity list is through indenting and outdenting activities.

This is primarily used when...

·You want to split up the plan into categories, users or sub-projects.

·You have a large project plan and want to work only with a portion of it. You can collapse the part of the project plan you want to hide and work only with visible part.



Indenting and outdenting

Select the activities you want to indent or outdent in the timeline activity list.

1) Select **Indent** or **Outdent** from the menu by clicking the right mouse button over a task in the list.

2) Press Tab on the keyboard to indent or press Shift + Tab on the keyboard to outdent.

Summary activities

When you indent an activity the activity above it will become a summary activity. The summary activity can be collapsed and expanded just like a regular tree, just click the minus and plus signs to the right of summary task name.

The start and end date of the summary activity is decided by the earliest and the latest task under it in the timeline activity list.

You can connect activities to summary activities and vice versa. The connection will then affect all activities under the summary activity.

More functions when editing a project plan

Multiple undo/redo

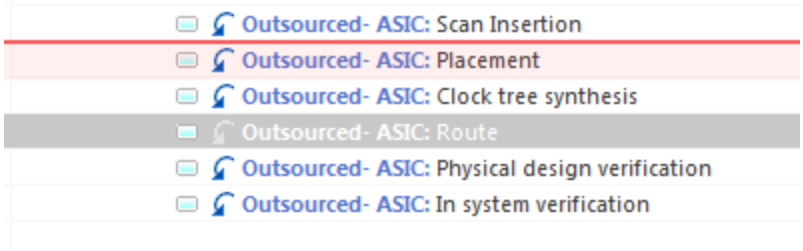
On the main timeline toolbar you will find the **undo / redo** buttons. Hansoft Project Manager supports multiple undo and redo steps, which often comes in handy when planning for large projects.

Tip: You may use Ctrl + Z for undo and Ctrl + Y for redo on the keyboard (Cmd + Z for undo and Ctrl + Y for redo on OSX).

Changing the vertical placement

If you drag the mouse up or down you can change the vertical placement of the activities.

A blue activity indicates that the vertical placement is legal. A red activity indicates that there is an illegal circular dependency between the activity and the summary activity above it. Hansoft Project Manager will automatically disconnect the illegal activity.


Outsourced- ASIC: Scan Insertion
Outsourced- ASIC: Placement
Outsourced- ASIC: Clock tree synthesis
Outsourced- ASIC: Route
Outsourced- ASIC: Physical design verification
Outsourced- ASIC: In system verification

Basic actions

The following actions can be performed on the selected activities in this menu:

·Cut deletes and copies the activity to the Hansoft Project Manager clipboard and to the Windows clipboard as raw text.

·Copy simply copies the activity to the Hansoft Project Manager clipboard and to the Windows clipboard as raw text.

·Paste pastes the current Hansoft Project Manager clipboard contents into the timeline activity list, above the currently selected task.

·Insert task Inserts a tasks above the currently selected task.

·Insert individual allocations inserts an individual allocation in the bottom. This is an easy way to examine user allocation, and detect possible conflicts between users, or between projects.

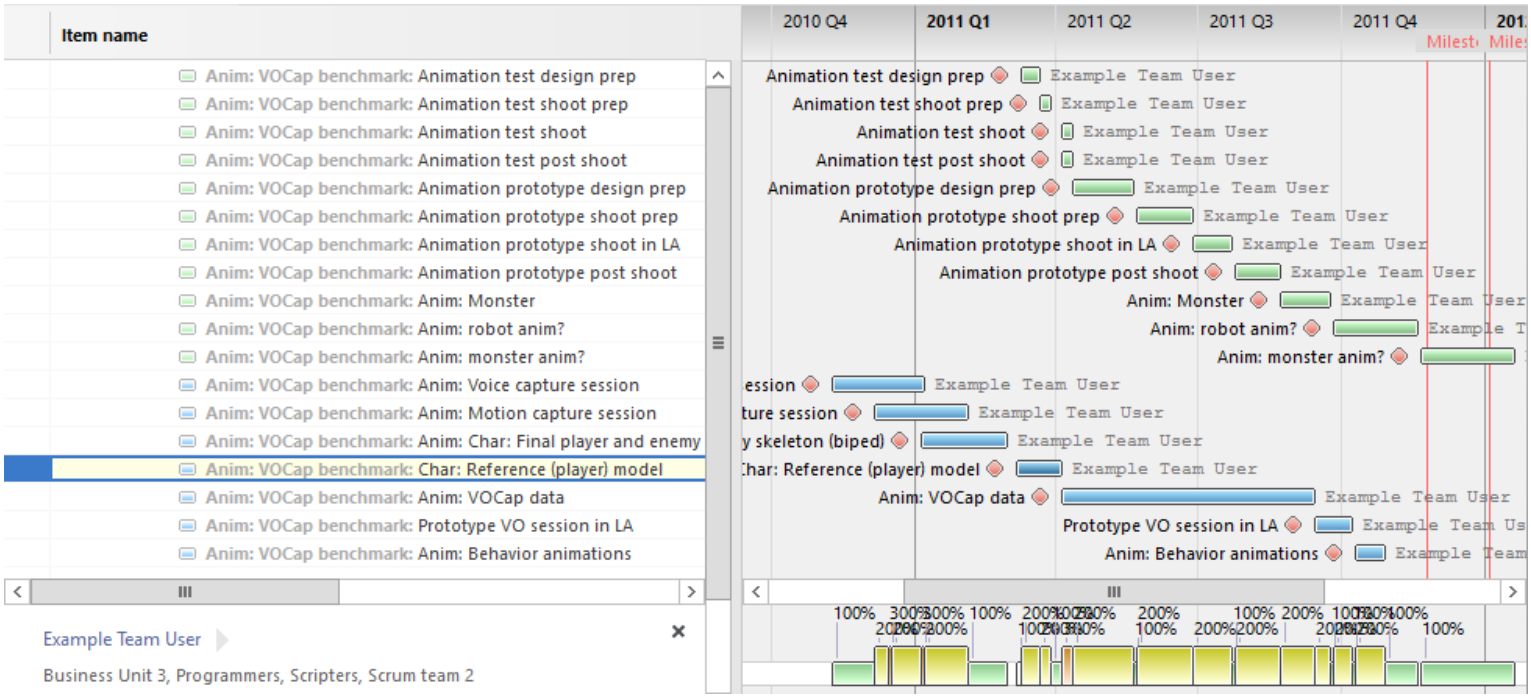
·Delete deletes the activity.

·Outdent outdents the current selection. Read more about this in the Indent, outdent and summary activities section of this help manual.

·Indent indents the current selection. Read more about this in the Indent, outdent and summary activities section of this help manual.

·Disconnect removes all connections to and from the activity.

·Set color sets the color of the activity.


Item name
Anim: VOCap benchmark: Animation test design prep
Anim: VOCap benchmark: Animation test shoot prep
Anim: VOCap benchmark: Animation test shoot
Anim: VOCap benchmark: Animation test post shoot
Anim: VOCap benchmark: Animation prototype design prep
Anim: VOCap benchmark: Animation prototype shoot prep
Anim: VOCap benchmark: Animation prototype shoot in LA
Anim: VOCap benchmark: Animation prototype post shoot
Anim: VOCap benchmark: Anim: Monster
Anim: VOCap benchmark: Anim: robot anim?
Anim: VOCap benchmark: Anim: monster anim?
Anim: VOCap benchmark: Anim: Voice capture session
Anim: VOCap benchmark: Anim: Motion capture session
Anim: VOCap benchmark: Anim: Char: Final player and enemy
Anim: VOCap benchmark: Char: Reference (player) model
Anim: VOCap benchmark: Anim: VOCap data
Anim: VOCap benchmark: Prototype VO session in LA
Anim: VOCap benchmark: Anim: Behavior animations
Example Team User
Business Unit 3, Programmers, Scripters, Scrum team 2
2010 Q4
2011 Q1
2011 Q2
2011 Q3
2011 Q4
Animation test design prep
Animation test shoot prep
Animation test shoot
Animation test post shoot
Animation prototype design prep
Animation prototype shoot prep
Animation prototype shoot in LA
Animation prototype post shoot
Anim: Monster
Anim: robot anim?
Anim: monster anim?
Anim: VOCap data
Prototype VO session in LA
Anim: Behavior animations
Example Team User

Read more about individual allocations in the Portfolio allocations section of this help manual.

Advanced actions

Transform tasks to releases transforms all selected tasks to releases.

Add or remove users opens the "add/remove users" window. Read more about this in the Assigning users to tasks section of this help manual.

Sort sorts the selected activities by start date, end date, description or duration. If you select a summary activity it will automatically select all activities under it and then sort.

Assigning users to tasks

One of the fundamental aspects of Hansoft Project Manager is the sharing of information, specifically the project plan. When you assign users to tasks, these tasks will immediately be visible to the assigned user - and to the whole project team.

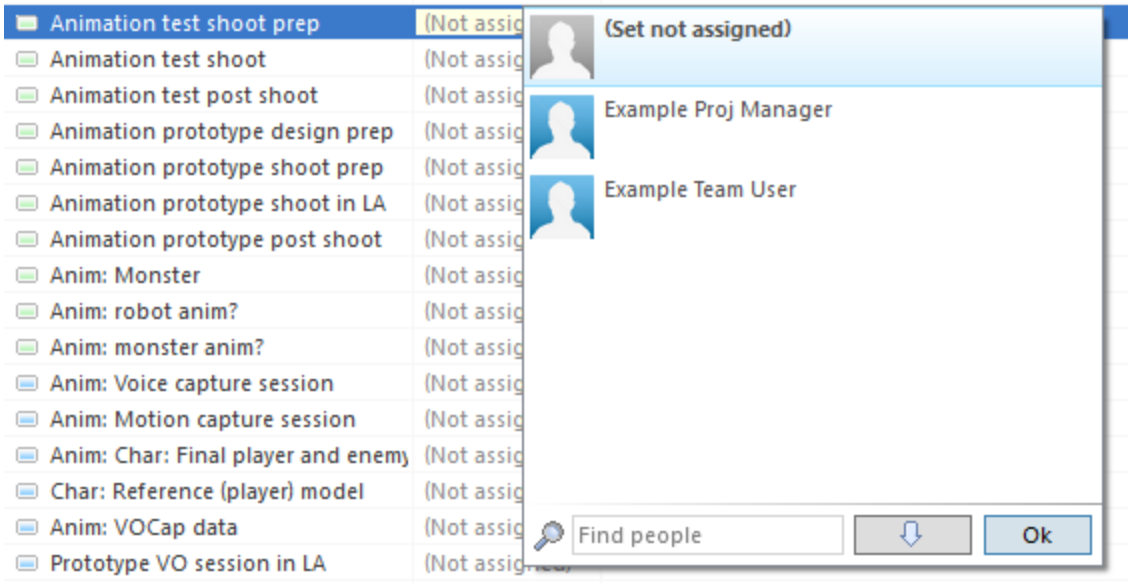
In the activity list, you can assign users to tasks and use the Portfolio allocations tool to see how that user is currently allocated, to avoid over- and under-allocation.

If you want help on adding users to the project go to the section on Allocating users to a project.

Assigning a user to a task

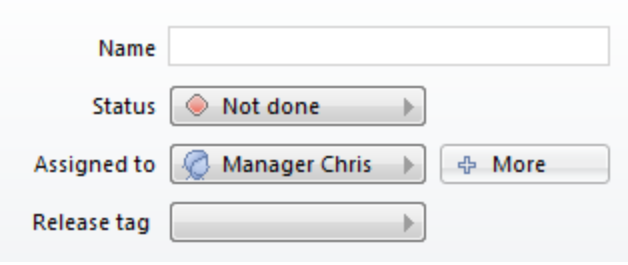
A quick way to assign one user to a task is to double click the field under the column Assigned to, or to select it in the Item Details window. The user you select will automatically be allocated 100% of the time in the project.

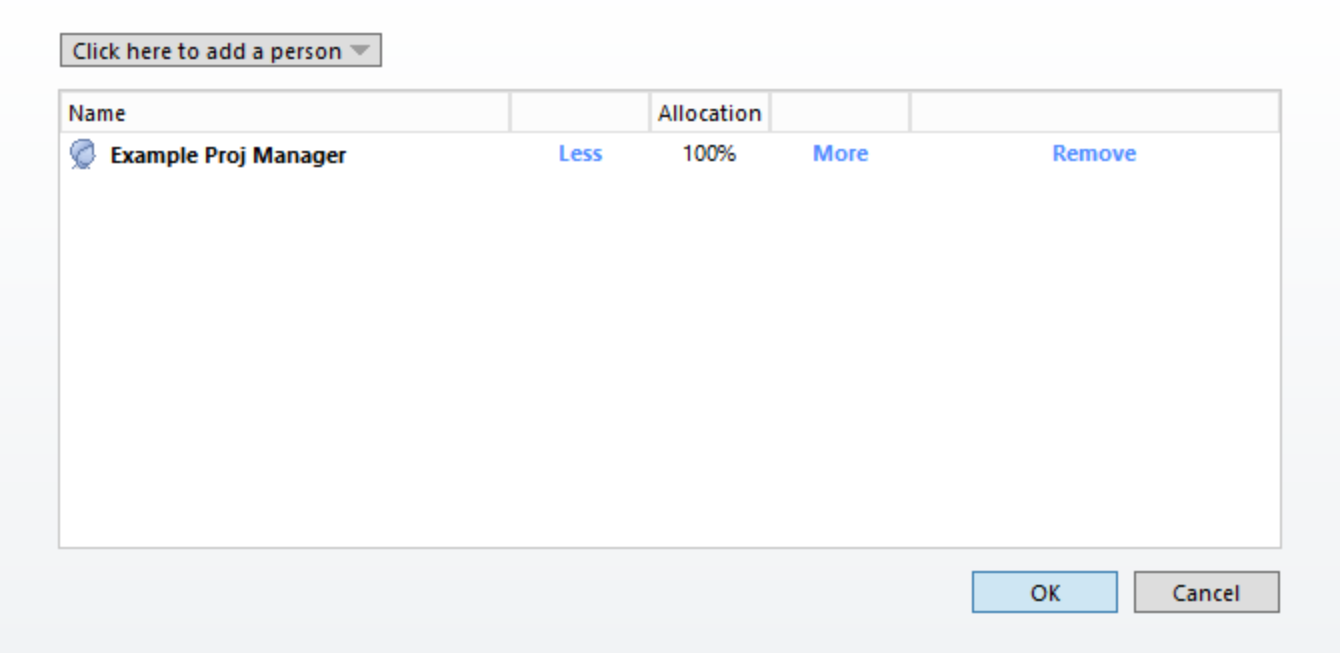
You can filter on different user groups, or find users by way of a free text search. This is very good for locating users in large teams.



Adding and removing multiple users

If you want to add or remove more users, or adjust the allocation of a user for a given task, open the "Add or remove users on selected activities" window. Do so by selecting the **Add or remove users** menu item in the main timeline activity list menu, by pressing Ctrl + R (Cmd + R) on the keyboard or by pressing the **More..** button on the activity details window (to the right of the user drop-down).

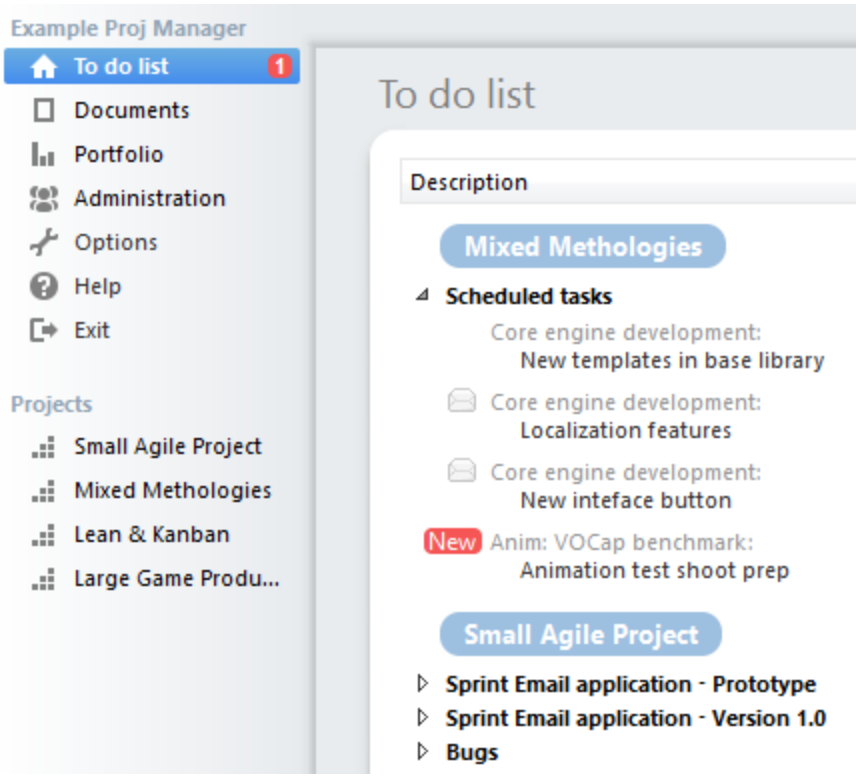




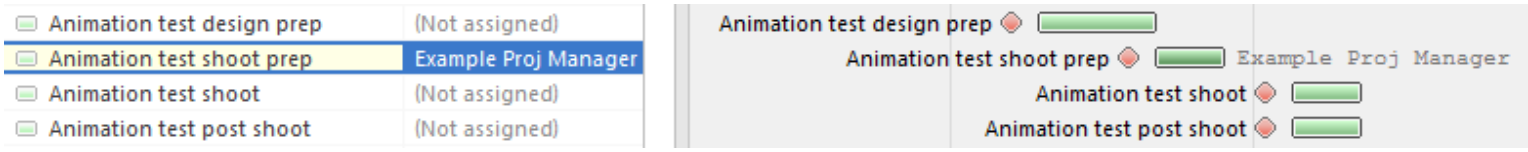
Here you can add users to the selected activities by selecting a user from the drop-down list. You can also change the allocation of a user on a task by clicking the **More and Less** buttons, or by directly specifying allocation in the edit field.

Assigning a user to a task

Once you have assigned a user to a task, that task will appear under the To do list for that user.

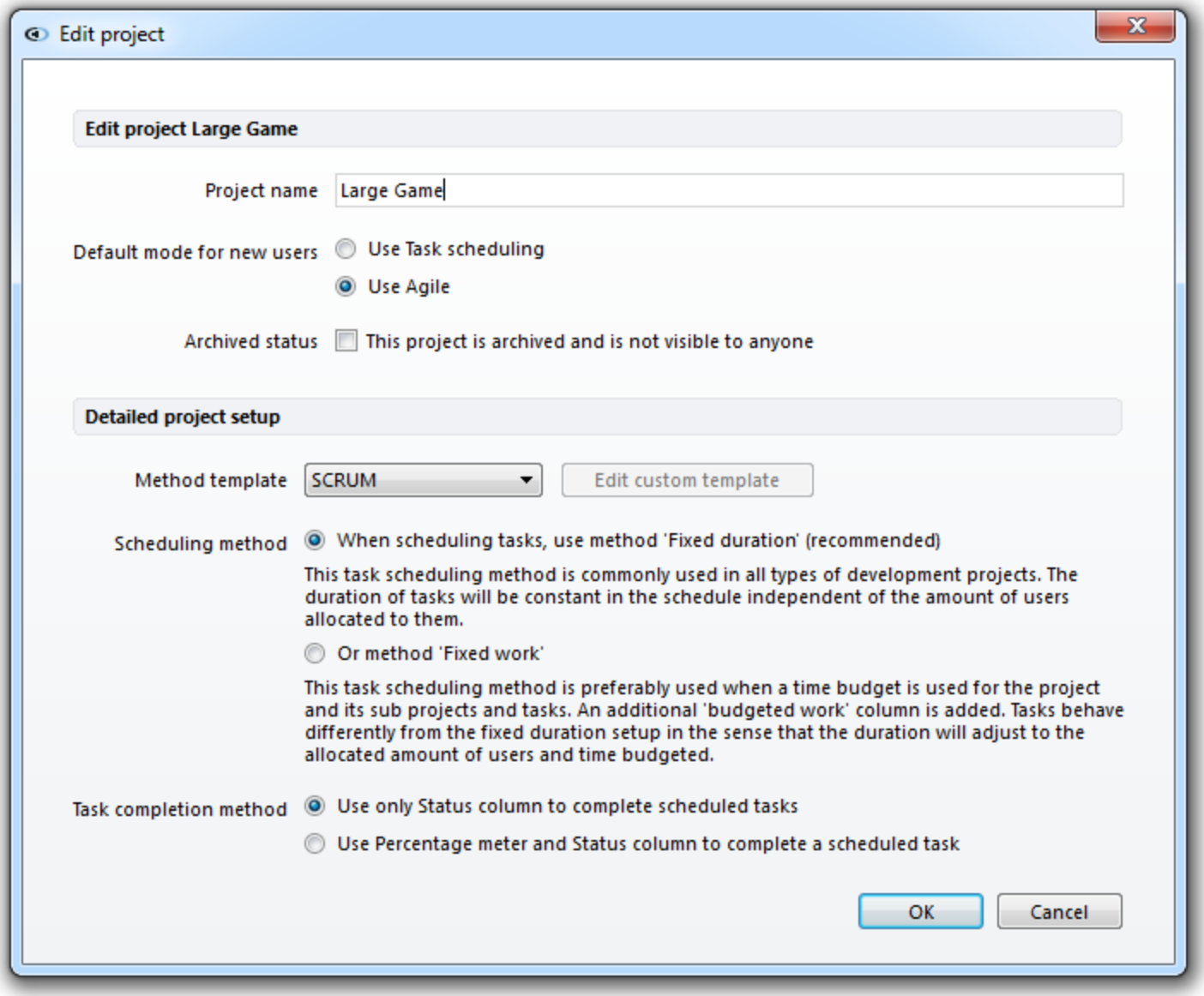


When you assign a user to a task, it will also immediately appear in the "Project Schedule" for everyone to see:



Fixed duration and fixed work

When you create or edit a project, you have the choice of two different task scheduling project methods: Fixed work and Fixed duration.


Edit project
Edit project Large Game
Project name
Large Game
Default mode for new users
Use Task scheduling
Use Agile
Archived status
This project is archived and is not visible to anyone
Detailed project setup
Method template
SCRUM
Edit custom template
Scheduling method
When scheduling tasks, use method 'Fixed duration' (recommended)
This task scheduling method is commonly used in all types of development projects. The duration of tasks will be constant in the schedule independent of the amount of users allocated to them.
Or method 'Fixed work'
This task scheduling method is preferably used when a time budget is used for the project and its sub projects and tasks. An additional 'budgeted work' column is added. Tasks behave differently from the fixed duration setup in the sense that the duration will adjust to the allocated amount of users and time budgeted.
Task completion method
Use only Status column to complete scheduled tasks
Use Percentage meter and Status column to complete a scheduled task
OK
Cancel

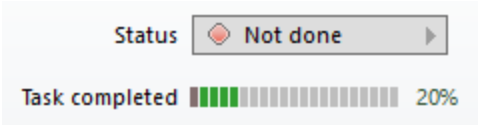
When using the Fixed work scheduling method an additional column for Budgeted work is added and shown in the activity list:

Budgeted work
248h
8h
64h
32h

Fixed work introduces both the Budgeted Work and the Earned value columns. This method focuses on budgeted hours rather than simply the duration of a task. This means that the duration of a task is automatically calculated by the budgeted hours and the amount of users put to this task. Note that the Earned value columns requires that the Earned value module is activated.

Example: You have budgeted 32 hours for a task (and use a standard 8 hour working day). Within this scenario, the task would then take one user 4 working days to perform. Alternatively, if we were to put two users on the task, it will take just 2 working days to perform. To take the example even further, having only one user working at a capacity of 50% on the task, it would take 8 working days to perform.

Fixed duration uses a simple yes/no condition to measure if the task is complete whereas the Fixed work method uses a percentage value to measure the degree of completion of a task. The actual work column automatically computes how many working hours have been added to the task, based on the percentage of completion of the task and the budgeted work.



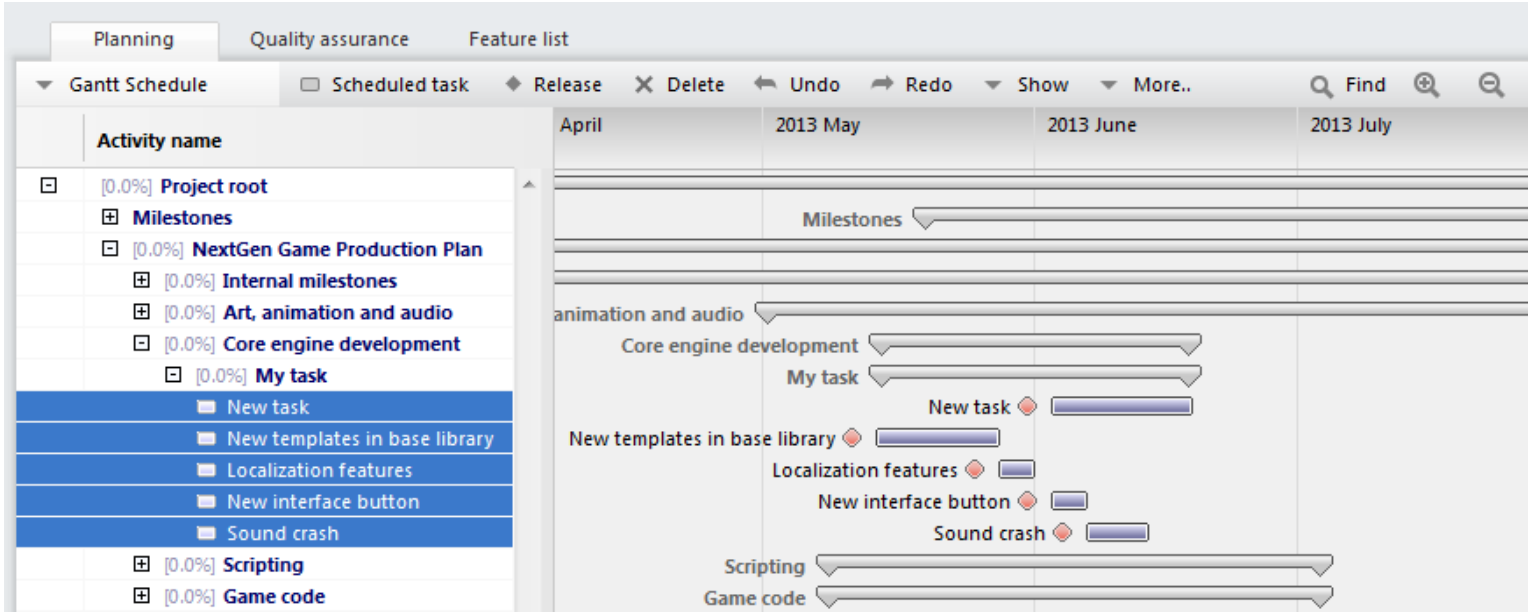
Arranging tasks (and user leveling)

Hansoft has support for traditional user leveling in task scheduling. However, leveling as an approach to balancing workload is generally a bit of a dead end in growing development teams. Many teams today have previous experience with leveling, using standard scheduling tools like Microsoft® Project®, before their teams became too large.

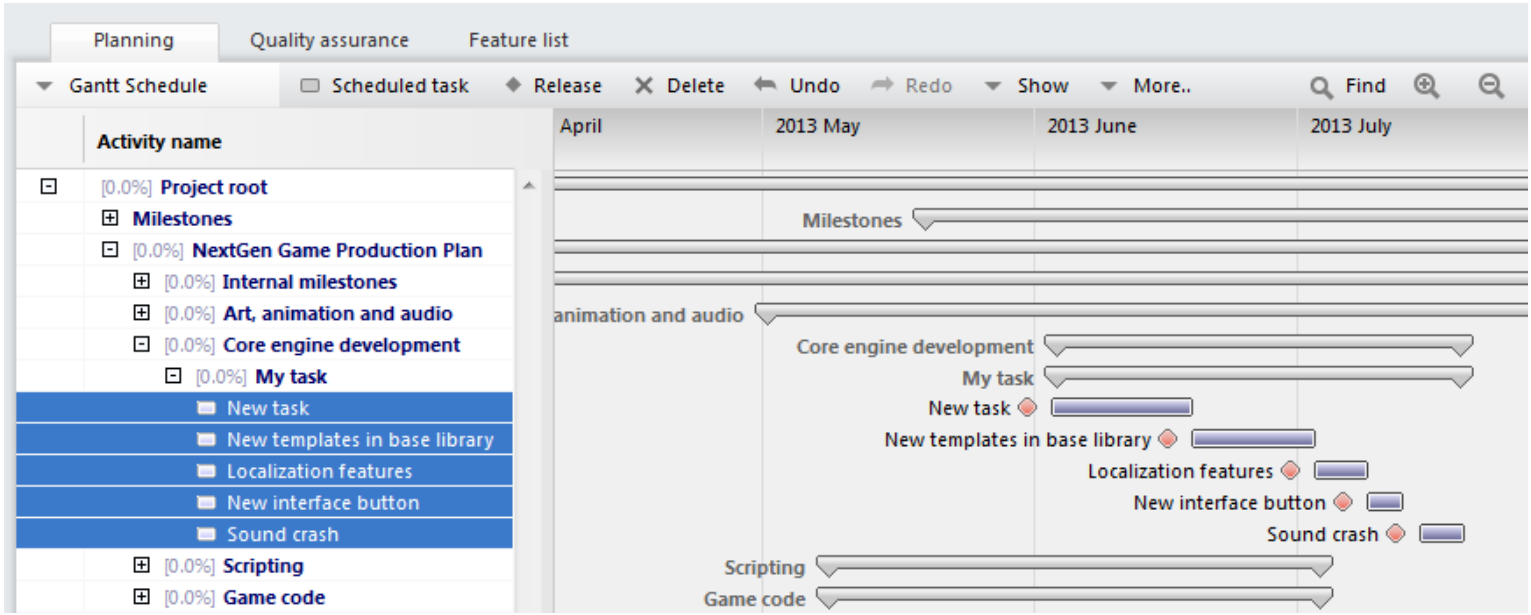
Hansoft is designed to support and enable an approach focused on delegated responsibilities and empowered teams which have a more collaborative approach to scheduling. We have found that this approach allows for great gains in company productivity.

User leveling and arranging tasks can be done in a variety of ways that can be seen in the following examples:

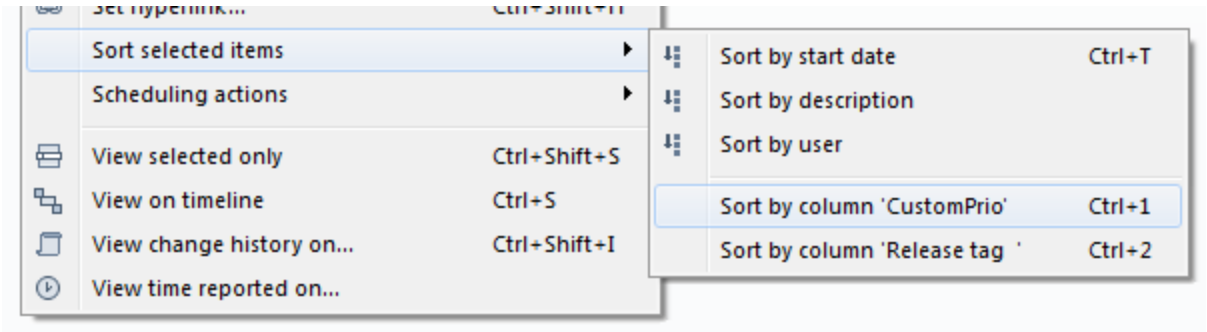
A set of tasks that you want to arrange can look like this:



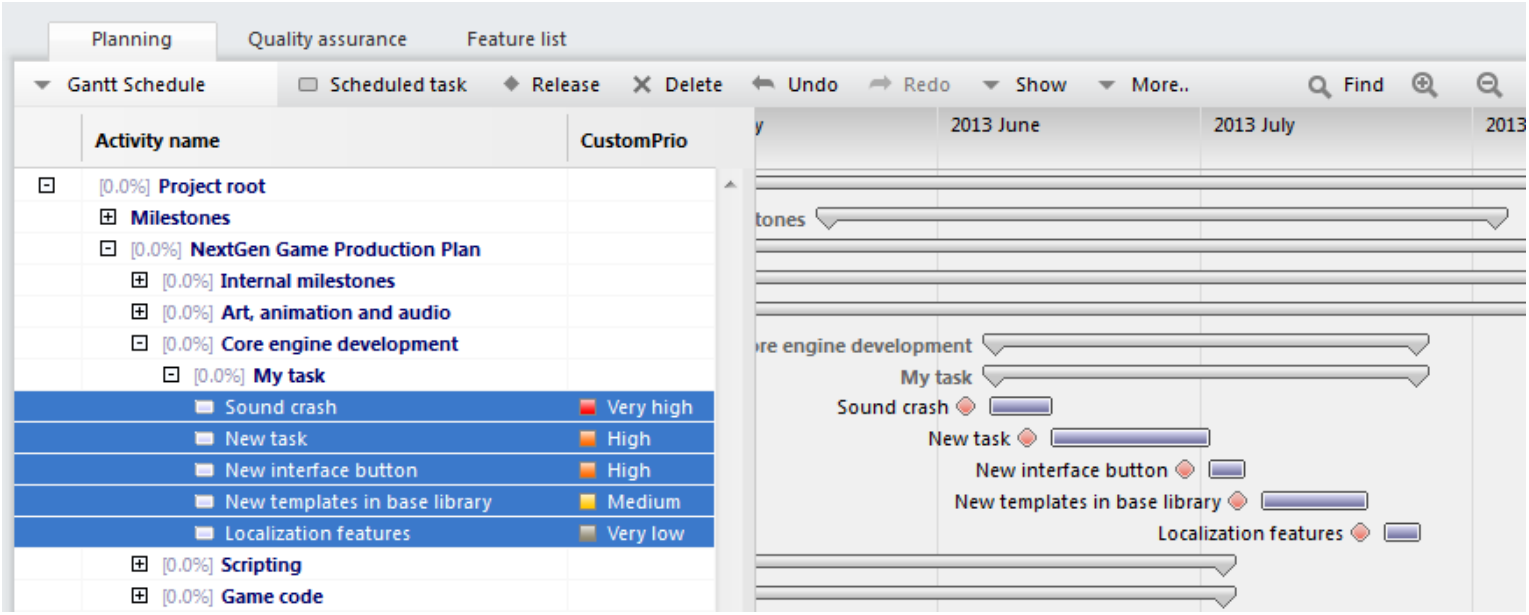
You can arrange tasks by using keyboard shortcut Ctrl + Shift + A (Cmd + Shift + A). The starting point of the new arrangement will be the first selected task:



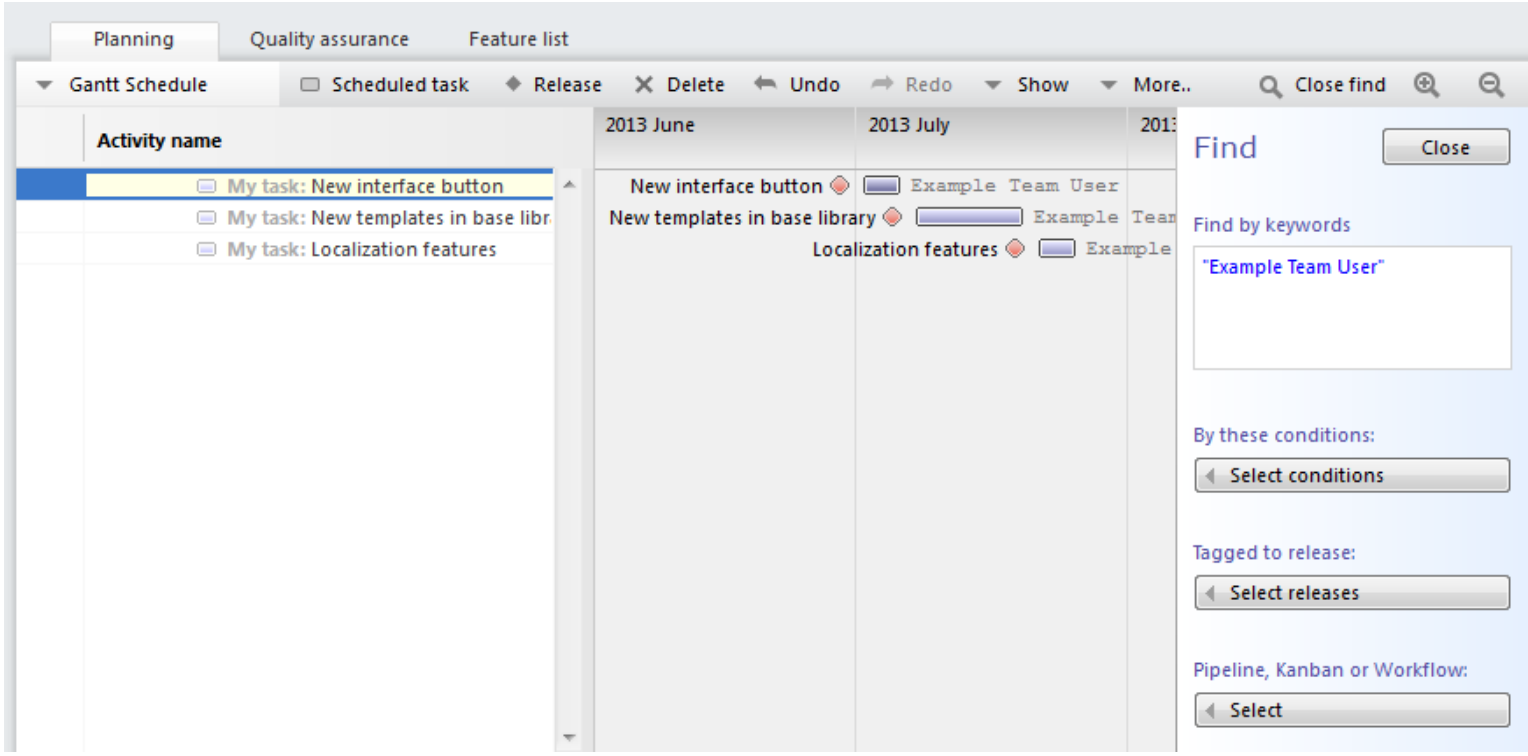
It is recommended that if you want to perform user leveling based on a priority column, you sort the custom columns first before arranging them (press Ctrl + 1, or Cmd + 1)


Sort selected items
Scheduling actions
View selected only Ctrl+Shift+S
View on timeline Ctrl+S
View change history on... Ctrl+Shift+I
View time reported on...
Sort by start date Ctrl+T
Sort by description
Sort by user
Sort by column 'CustomPrio' Ctrl+1
Sort by column 'Release tag ' Ctrl+2

You can now arrange them by numeric data in the [custom "CustomPrio" column] and user (in this case key-board shortcut Ctrl + Shift + 1, or Cmd + Shift + 1).



To perform user leveling for one or more users, it is recommended that you use **Show>Show individual allocation** and then select a user. Open [Find] and write the name of the user. In this way, you will get a clear view of the user when working with user leveling:

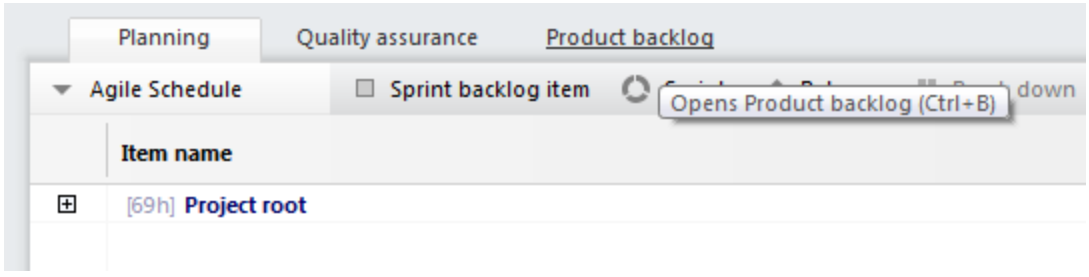


Using the product backlog in scheduling projects

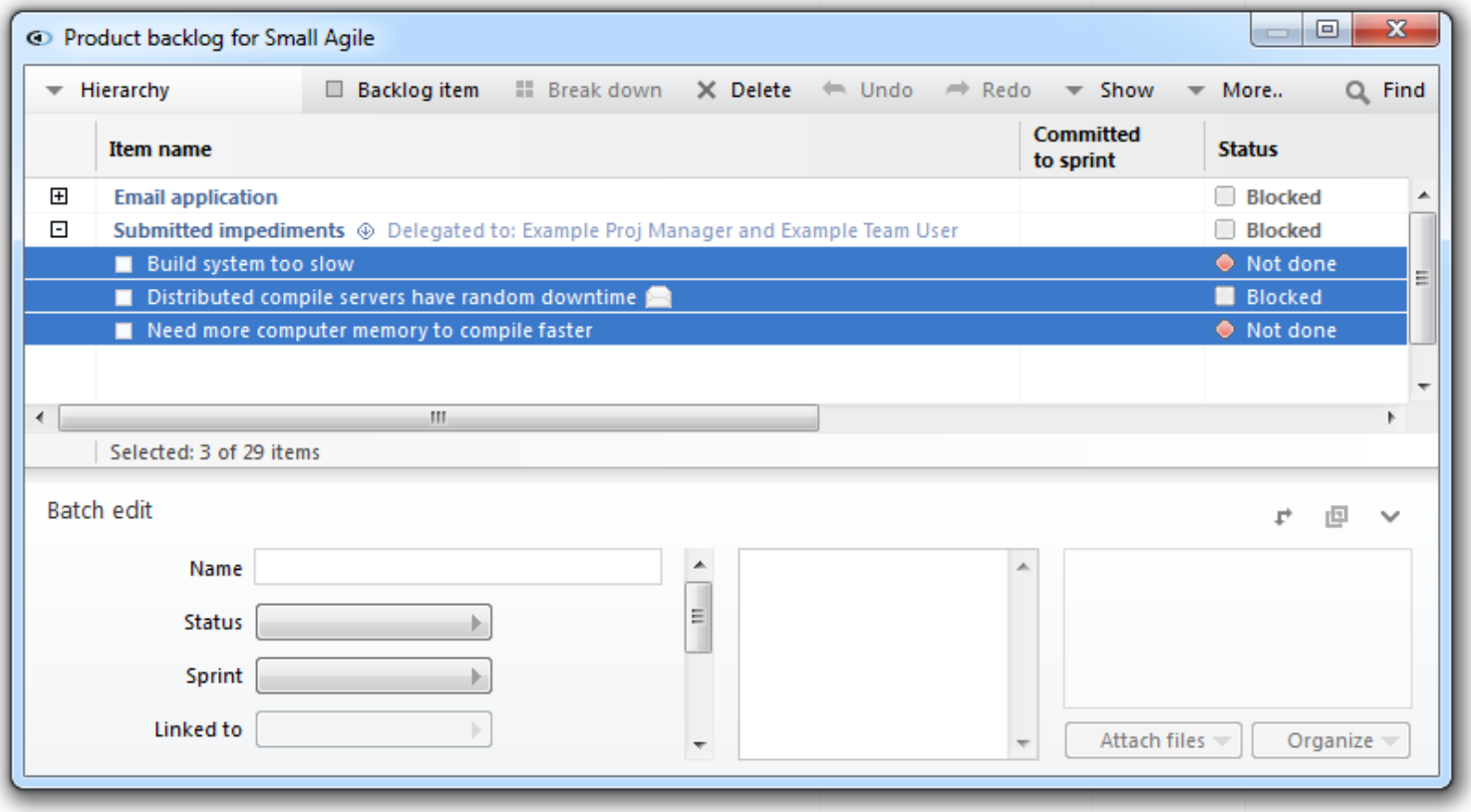
From Hansoft 5.3 and onwards you commit items from the product backlog to a schedule. This is very useful because features can be listed, categorized and analyzed in the product backlog and then planned out in the planning view.

Read more about the functionality of the product backlog here.

Click on Product backlog on the navigation bar. You can also press Ctrl + B, or Cmd + B on OSX.

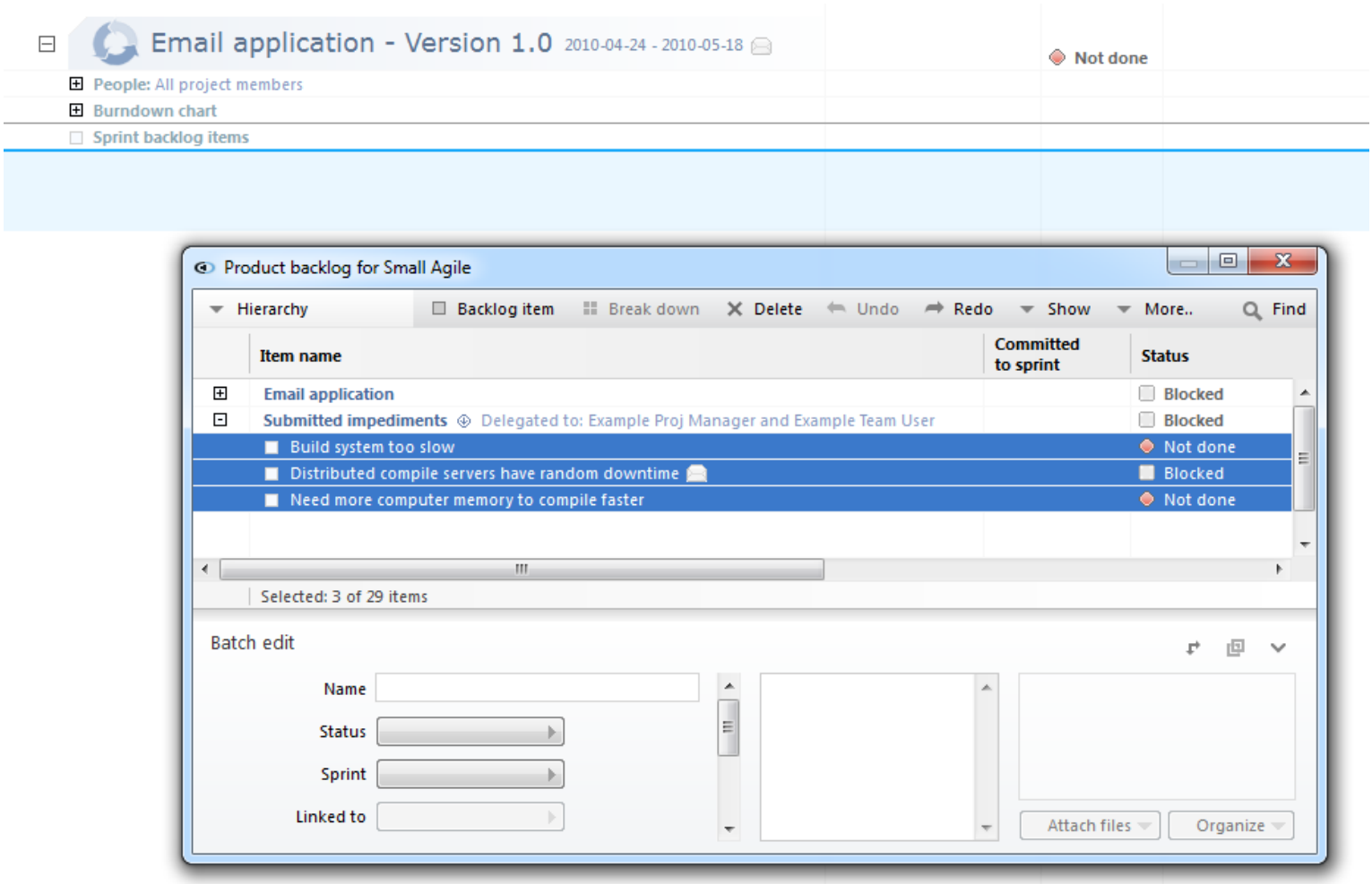


Create features, enhancements or other items in the backlog:

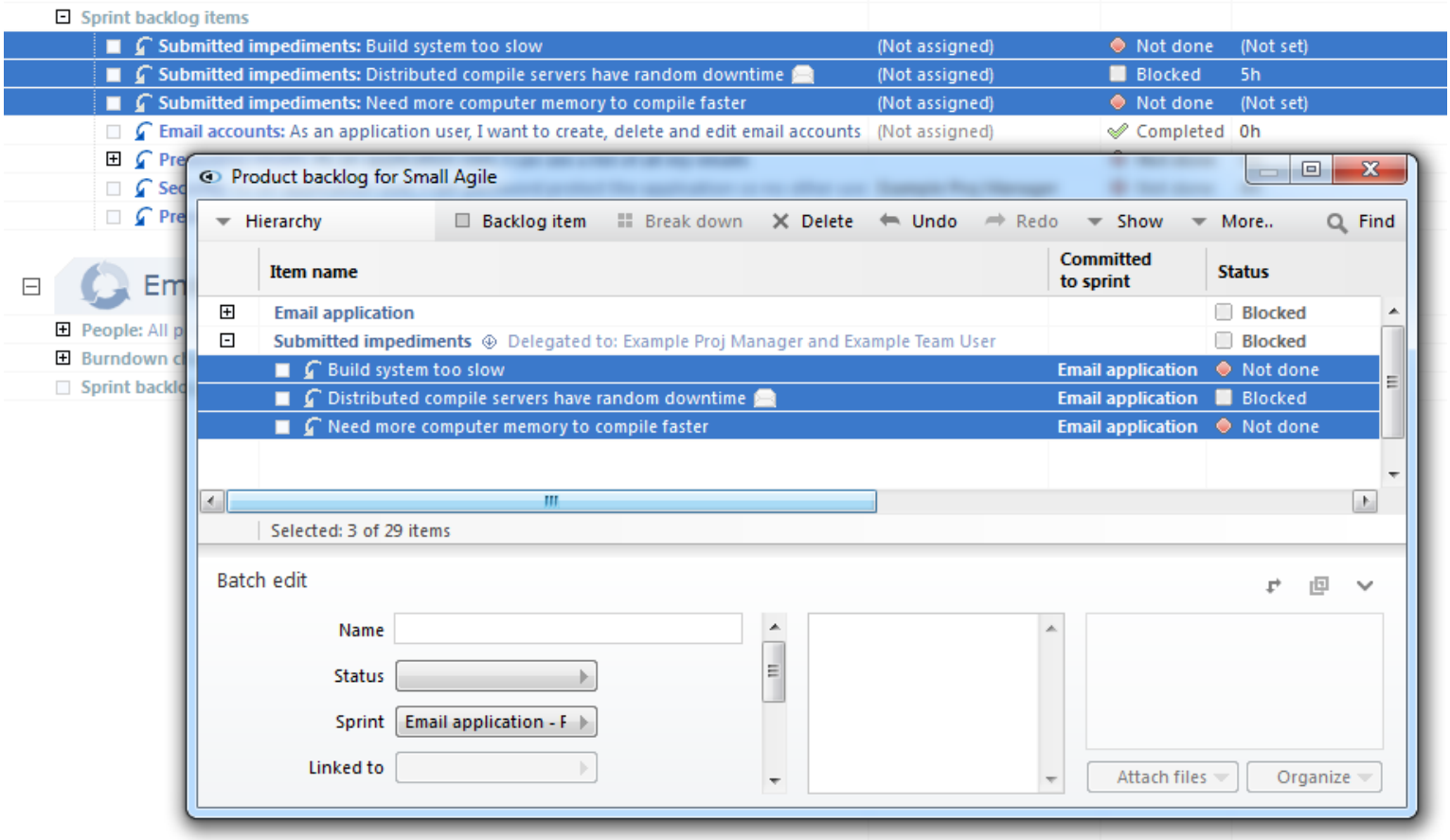


Borrowing a functionality originally from agile this lets you create items in the backlog and then committing them to the schedule.

Drag the items from the backlog to the schedule. Items will stay in the backlog while they at the same are planned in the project schedule:



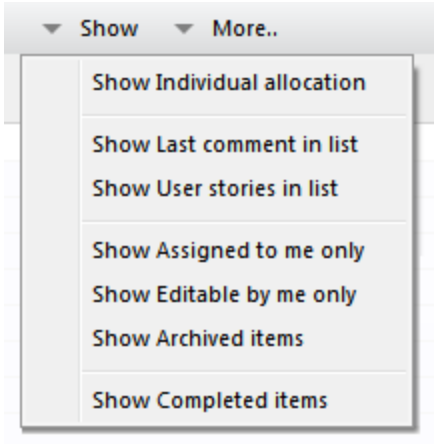
The view with the items in both the sprint backlog and the product backlog:


Sprint backlog items
Submitted impediments: Build system too slow (Not assigned) Not done (Not set)
Submitted impediments: Distributed compile servers have random downtime (Not assigned) Blocked 5h
Submitted impediments: Need more computer memory to compile faster (Not assigned) Not done (Not set)
Email accounts: As an application user, I want to create, delete and edit email accounts (Not assigned) Completed 0h
Product backlog for Small Agile
Hierarchy
Backlog item
Break down
Delete
Undo
Redo
Show
More..
Find
Item name
Committed to sprint
Status
Email application Blocked
Submitted impediments Delegated to: Example Proj Manager and Example Team User Blocked
Build system too slow Email application Not done
Distributed compile servers have random downtime Email application Blocked
Need more computer memory to compile faster Email application Not done
Selected: 3 of 29 items
Batch edit
Name
Status
Sprint
Email application - F
Linked to
Attach files
Organize

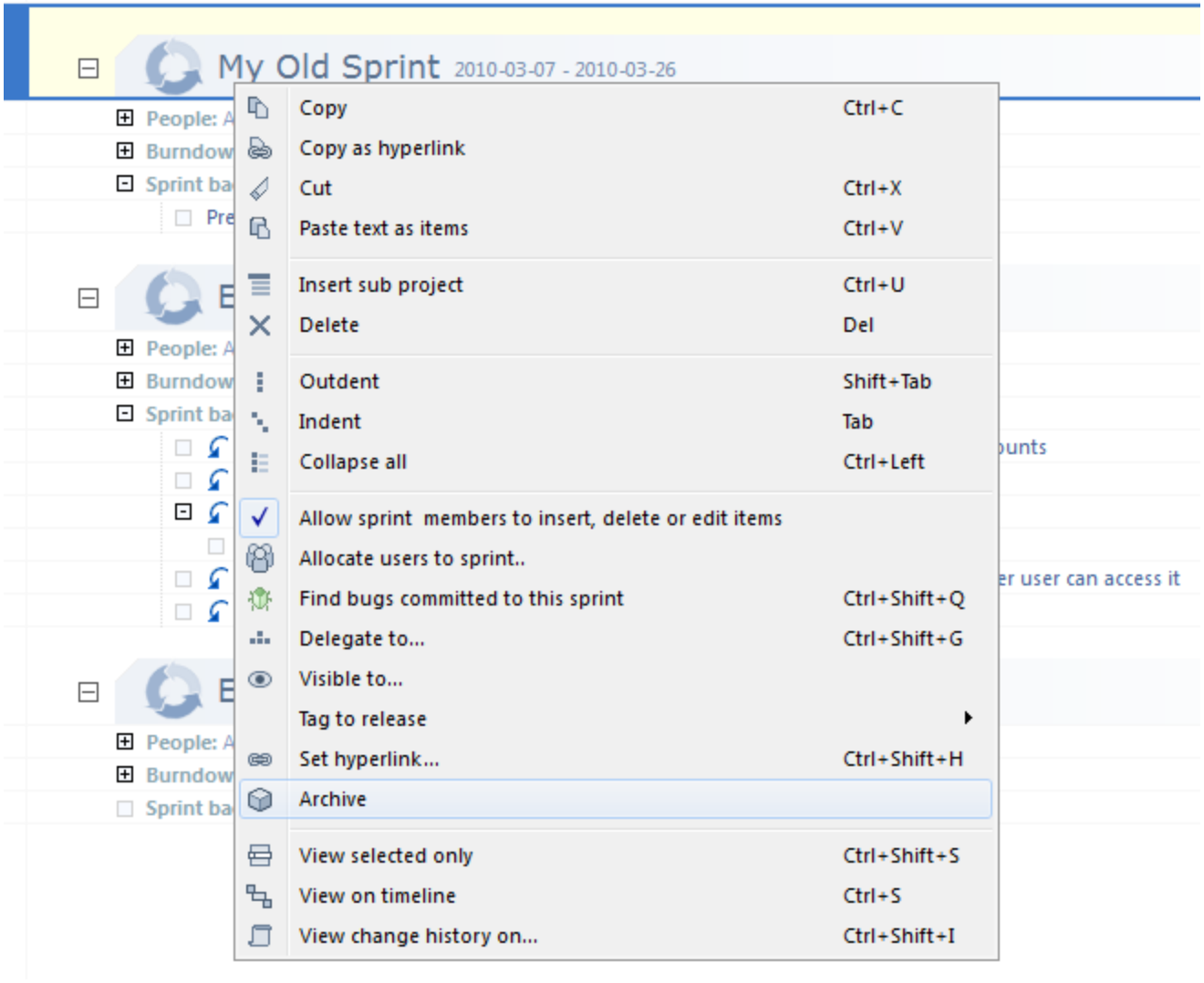
More important functions

Showing and hiding items

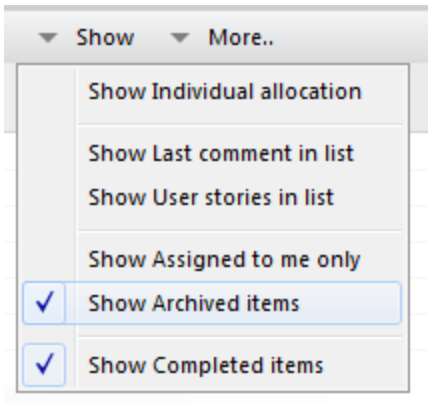
A useful tool in Hansoft is the "Show and Hide" option available on the toolbar in the planning view and product backlog. Options for Showing comments and User story or Detailed description text are available in "Portfolio Find" and the "Quality Assurance" part of Hansoft.



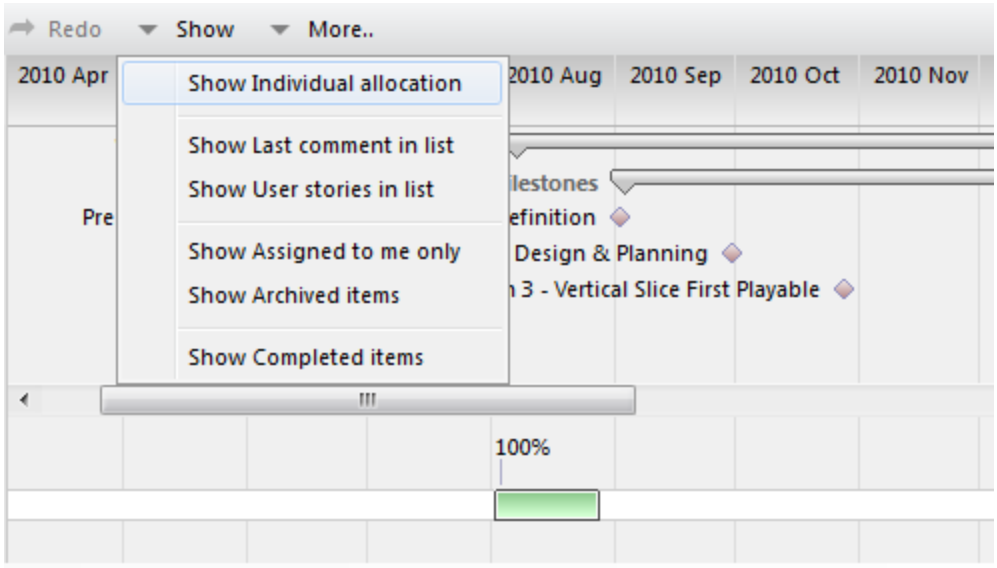
You can choose to hide or show archived items. Select a part of the project you want to hide by archiving in the context click menu:



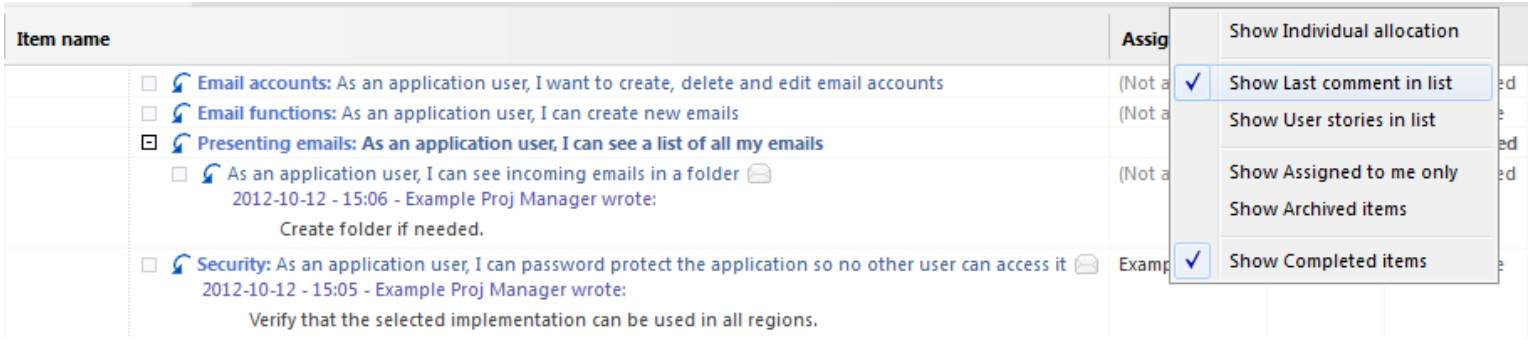
Show them again by selecting Show Archived items:



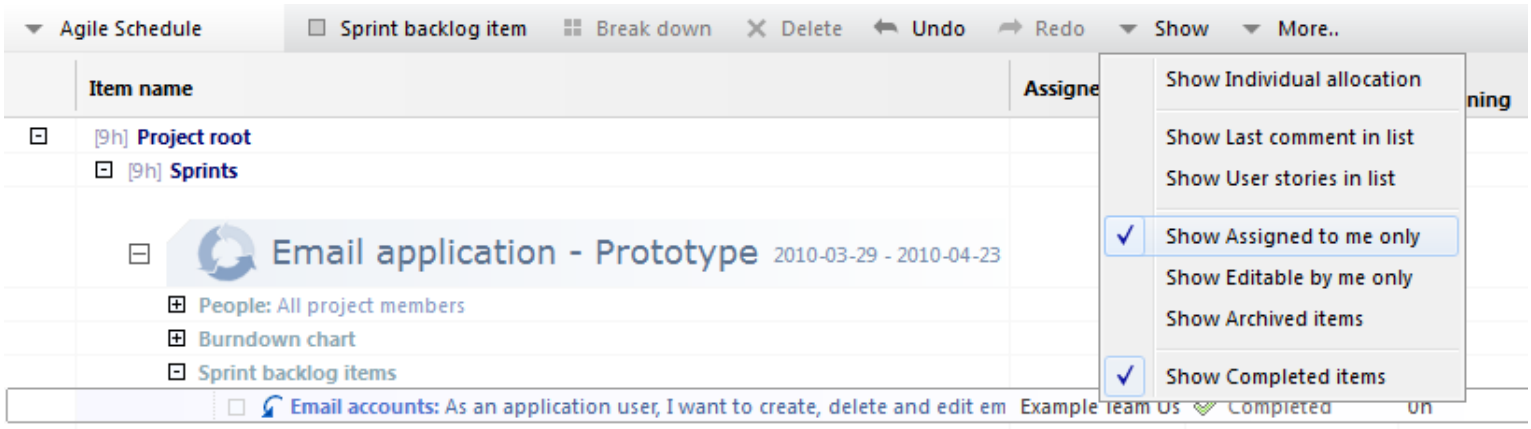
You can also show workload for individuals:



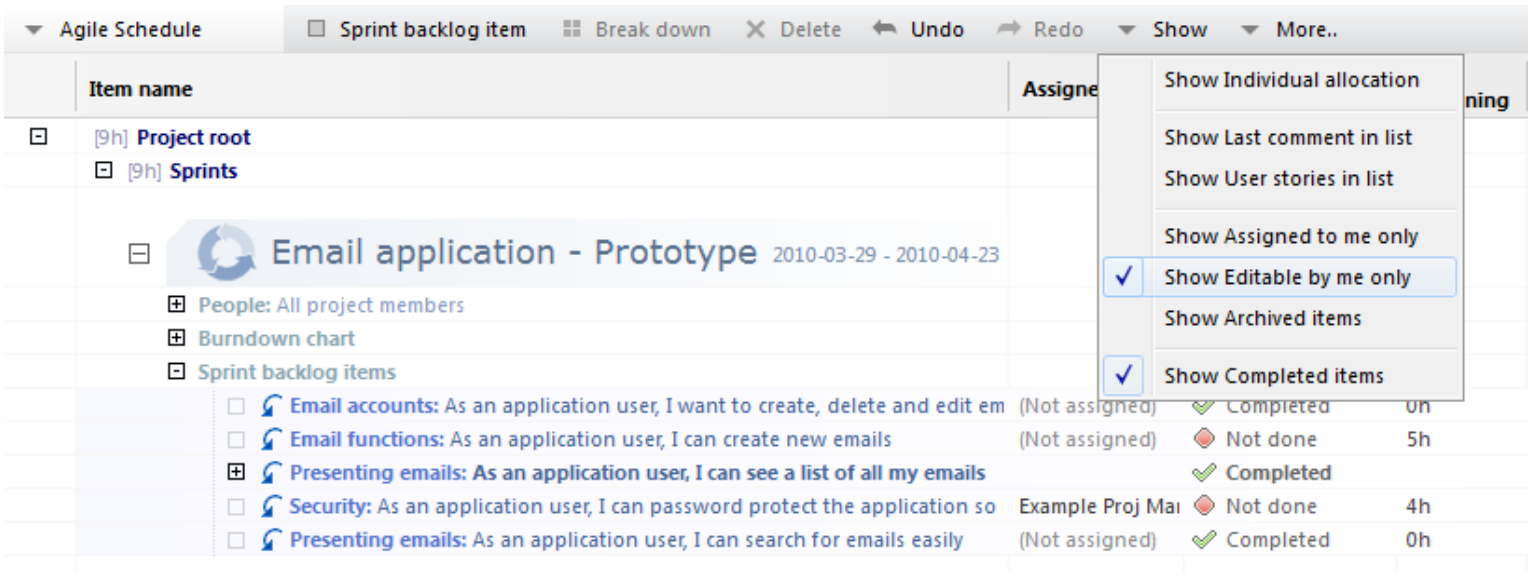
Show comments and User story text directly in the list view:


Item name
Assig
Email accounts: As an application user, I want to create, delete and edit email accounts
Email functions: As an application user, I can create new emails
Presenting emails: As an application user, I can see a list of all my emails
As an application user, I can see incoming emails in a folder
2012-10-12 - 15:06 - Example Proj Manager wrote:
Create folder if needed.
Security: As an application user, I can password protect the application so no other user can access it
2012-10-12 - 15:05 - Example Proj Manager wrote:
Verify that the selected implementation can be used in all regions.
Show Individual allocation
Show Last comment in list
Show User stories in list
Show Assigned to me only
Show Archived items
Show Completed items

Show items assigned to me only:



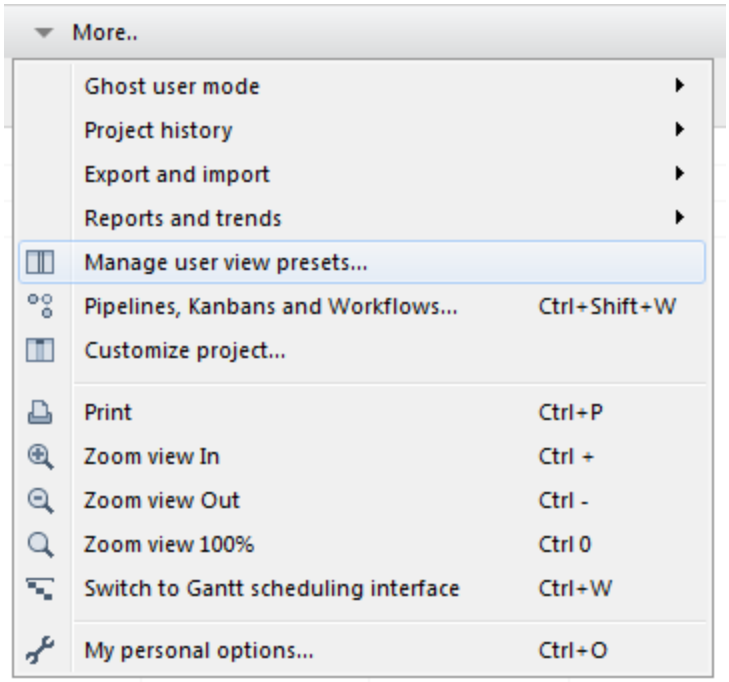
Show items that you have permission to edit (either by delegation or sprint membership):



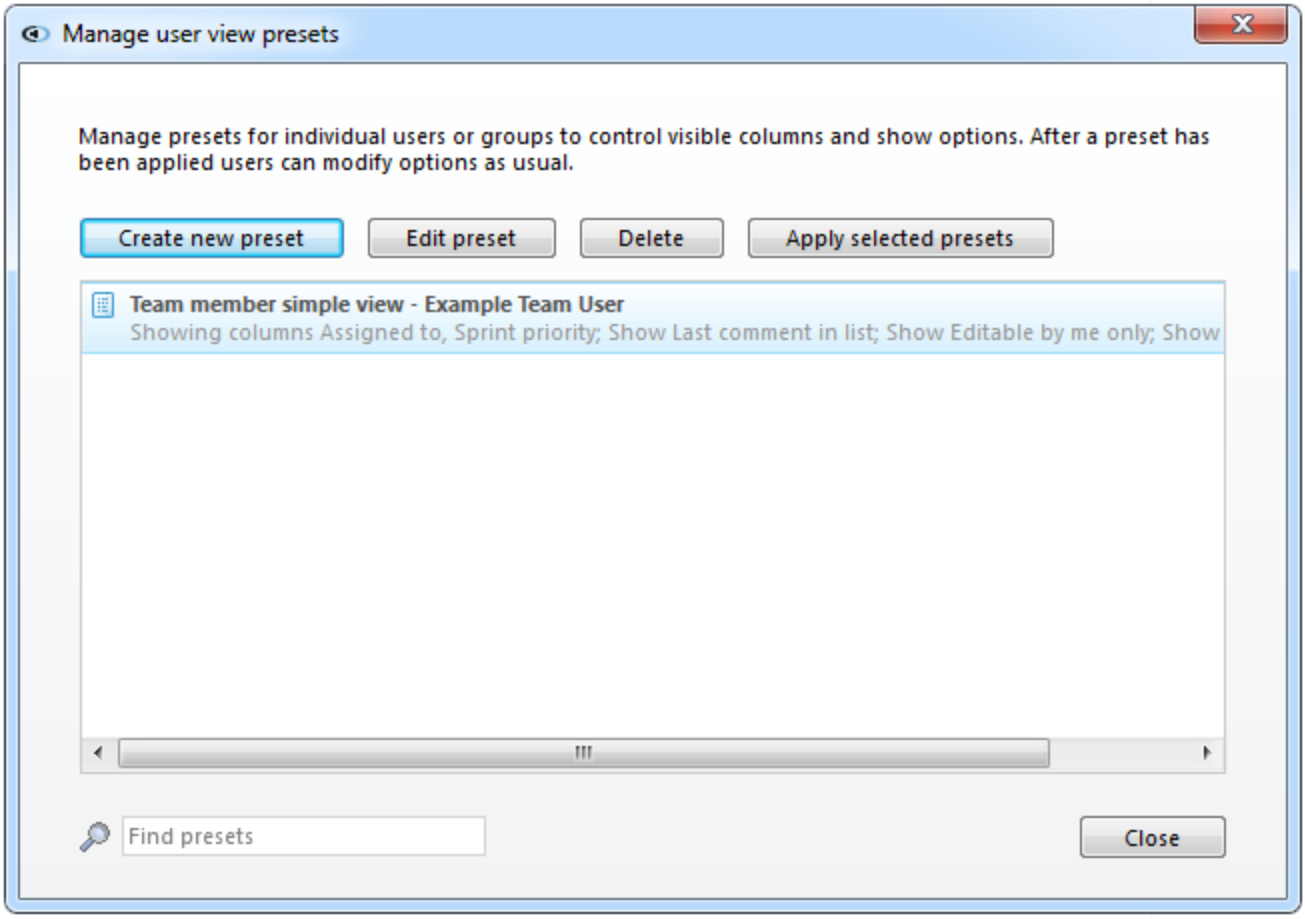
User view presets

User view presets are used by project managers to control and simplify the view options for team members.

Go to **More..>Manage user view presets**.

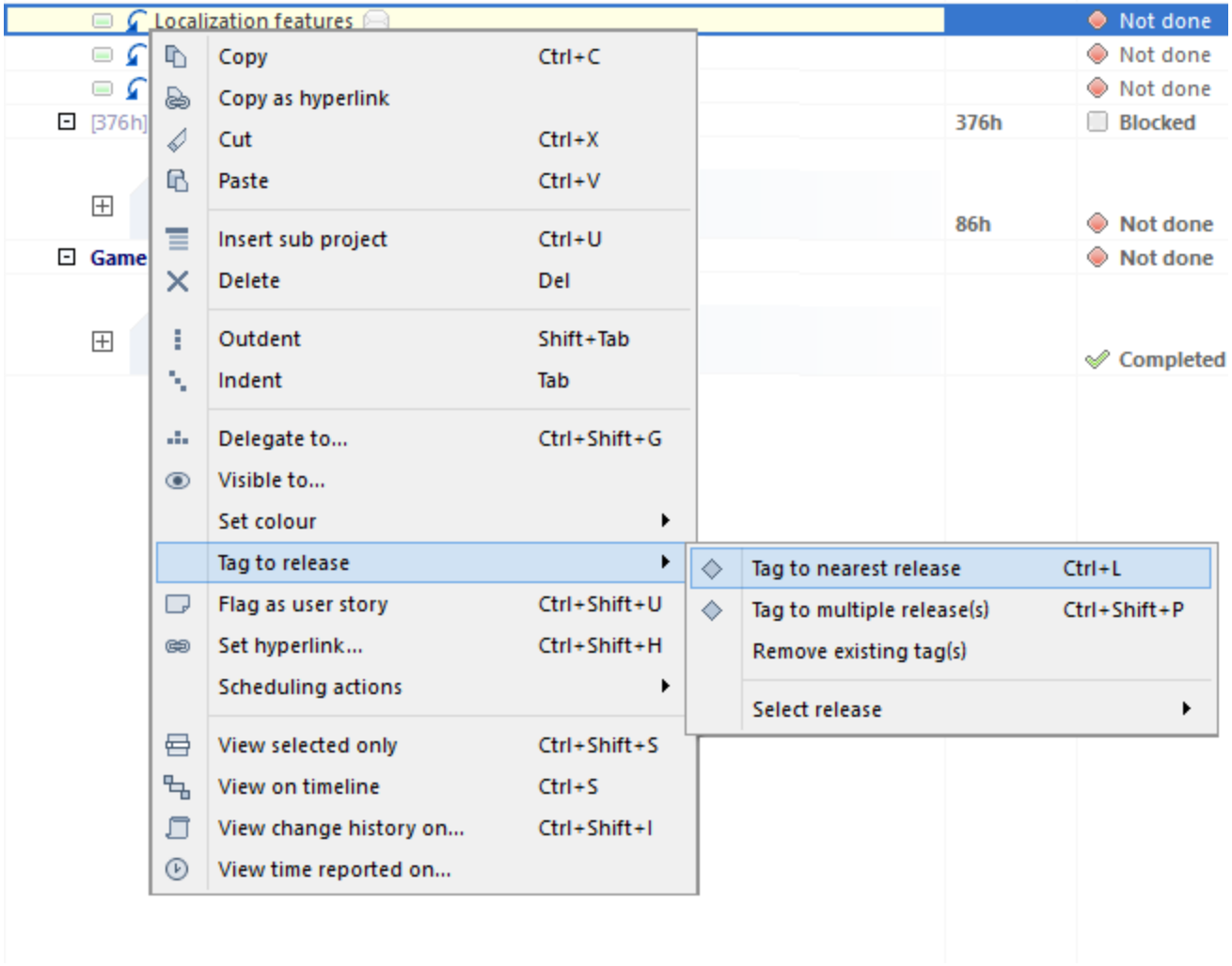


Create a preset and then select and apply the preset, it will have an immediate effect. A preset will never automatically be applied except for when users are connected to the project and belongs to a user group that is in the preset.


Manage user view presets
Manage presets for individual users or groups to control visible columns and show options. After a preset has been applied users can modify options as usual.
Create new preset
Edit preset
Delete
Apply selected presets
Team member simple view - Example Team User
Showing columns Assigned to, Sprint priority; Show Last comment in list; Show Editable by me only; Show
Find presets
Close

Release tags

Hansoft provides functionality for tagging tasks and items to releases. Right-click on an activity and select **Tag to release** and find your desired release. You can also link tasks to the nearest release in terms of time (end date of tasks compared to the due date of release) and to multiple releases:

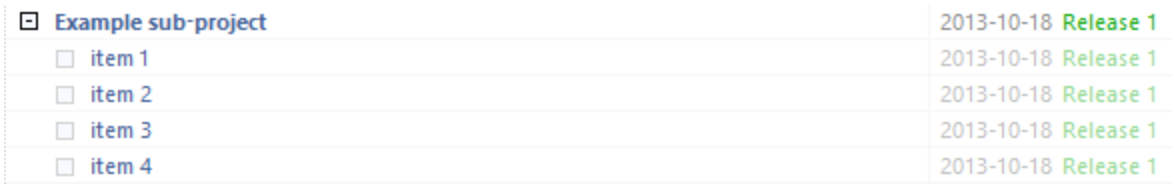


Flexible release tagging

Grasping the underlying concepts of release tagging in Hansoft is key when attempting to plan larger projects or undertakings.

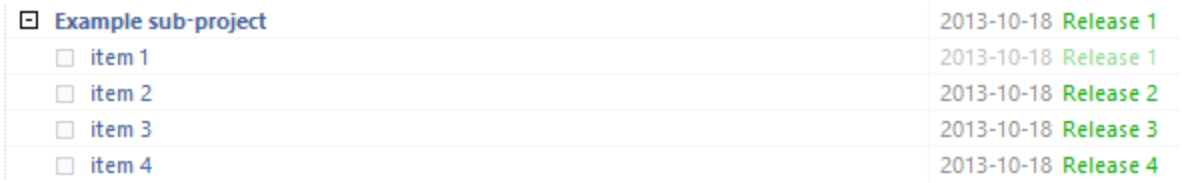
The first thing to point out is the inheritance aspect of Hansoft release tagging.

When Adding a release tag to a parent item, underlying child items will inherit the release tag value.


Example sub-project 2013-10-18 Release 1
item 1 2013-10-18 Release 1
item 2 2013-10-18 Release 1
item 3 2013-10-18 Release 1
item 4 2013-10-18 Release 1

You can also explicitly set the release tag of items, allowing the tag to be retained throughout all different views of Hansoft. To explicitly set a release tag use the "Release tag" column to define a tag that will be

associated with the current item. A release tag set in this manner cannot be overridden by changing the tagging of the parent item or sprint.

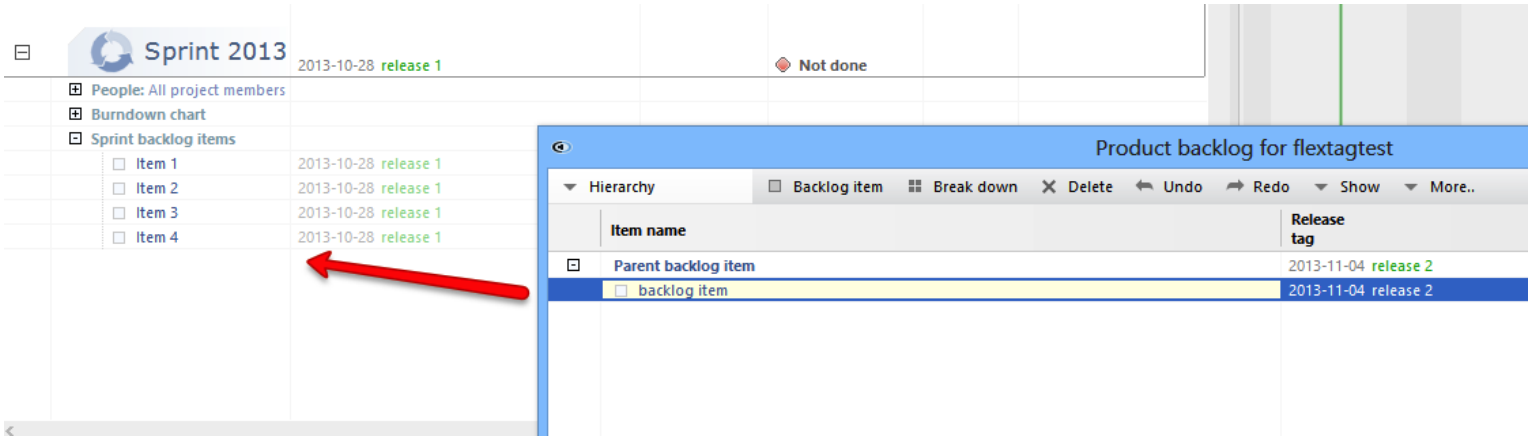

Example sub-project 2013-10-18 Release 1
item 1 2013-10-18 Release 1
item 2 2013-10-18 Release 2
item 3 2013-10-18 Release 3
item 4 2013-10-18 Release 4

In this example image release 2,3 and 4 are explicitly set to their corresponding items, meaning the release tag has been specifically set for each of these items individually. Note that they have a bold font-weight signifying the explicitly set status while an inherited release tag has a lighter font-weight. Item 1 has an inherited release tag.

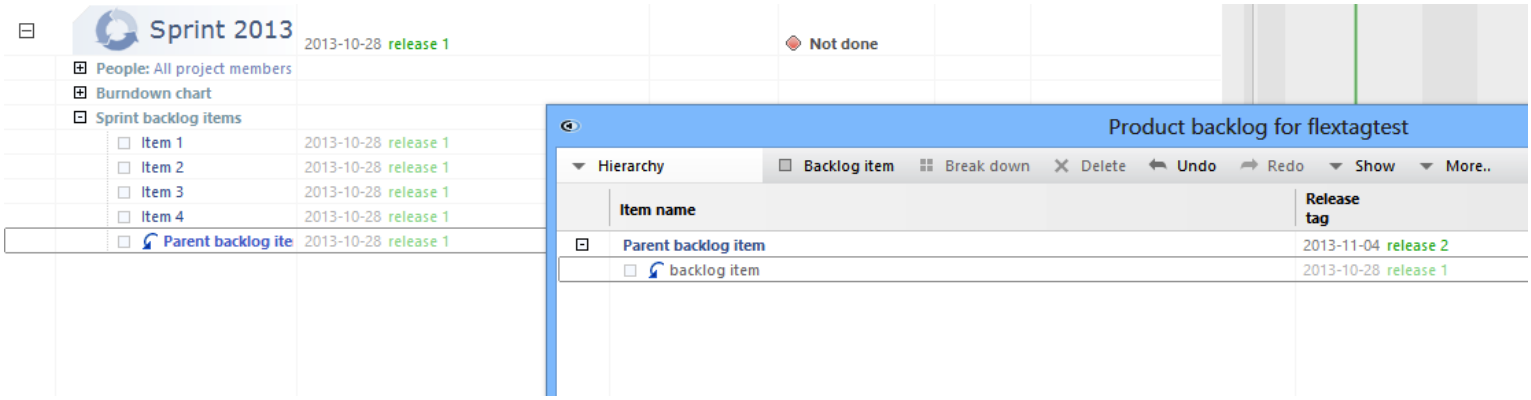
Inheritance and the product backlog

When committing an item from the backlog to a sprint it is worth noting that a release tag in the schedule view, inherited or not, will overwrite a tag inherited from the backlog.

Example:



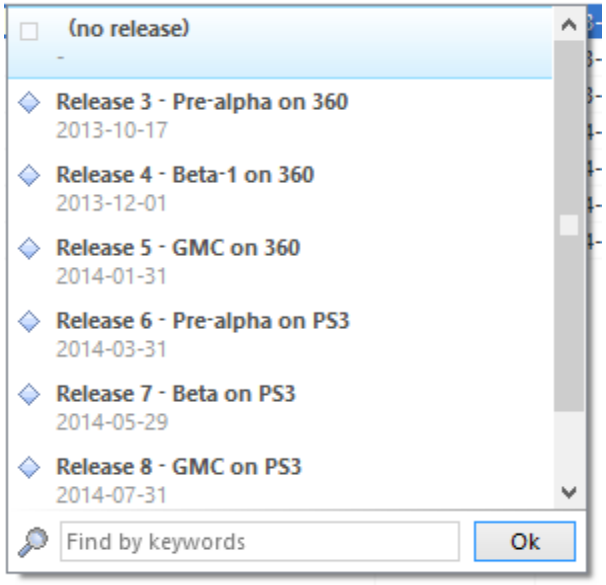
Moving an item from the backlog to a sprint.



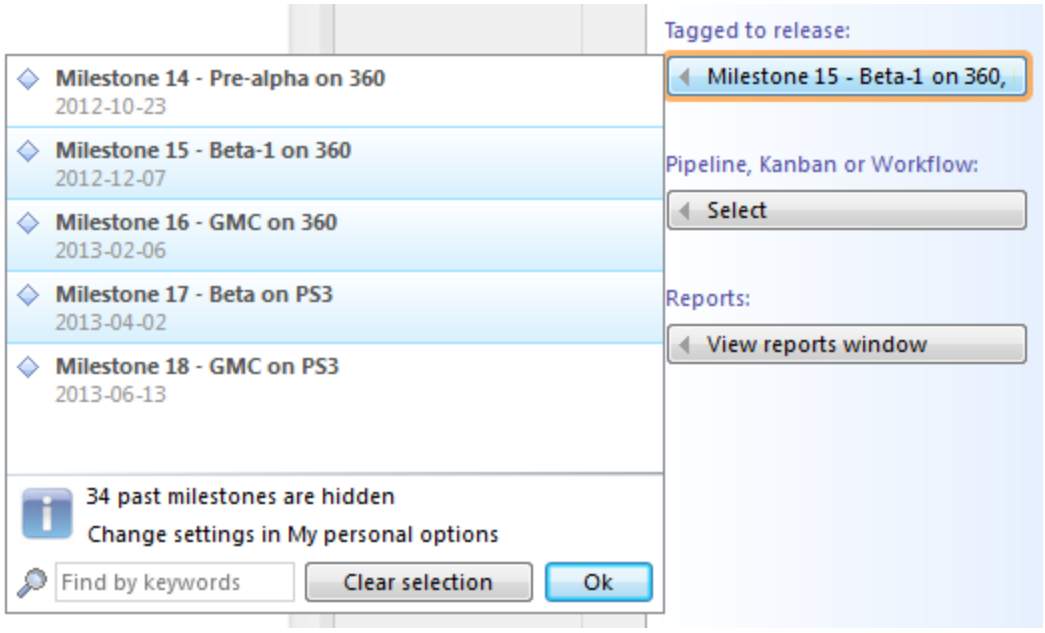
After the item has been moved to the sprint it inherits the sprint release tag.

Tag to multiple releases

Double click the Release tag column and select the releases to tag to:



It is easy to view which tasks are tagged to a specific release by opening the Find window and selecting a release from the drop-down list. You can then compile a release status report:



Use shift or control to select multiple milestones/releases.

Customize project columns

You can customize extra project columns for each project (and backlog) in Hansoft. Hansoft also comes with a variety of pre-created columns that easily can be activated.

Pre-created columns

·Complexity points (often used in agile projects)
·Confidence (often used in agile projects)
·Item status (often used in agile projects)
·Risk (often used in agile projects)
·Estimated ideal days (often used in the backlog in agile projects)
·Hyperlink (often used to integrate with SCM and asset management systems)
·Priority (often used in agile projects)
·Release tag (often used in the backlog in agile projects)
·Sub project path (sub project path shown in a separate column as opposed to before item name)

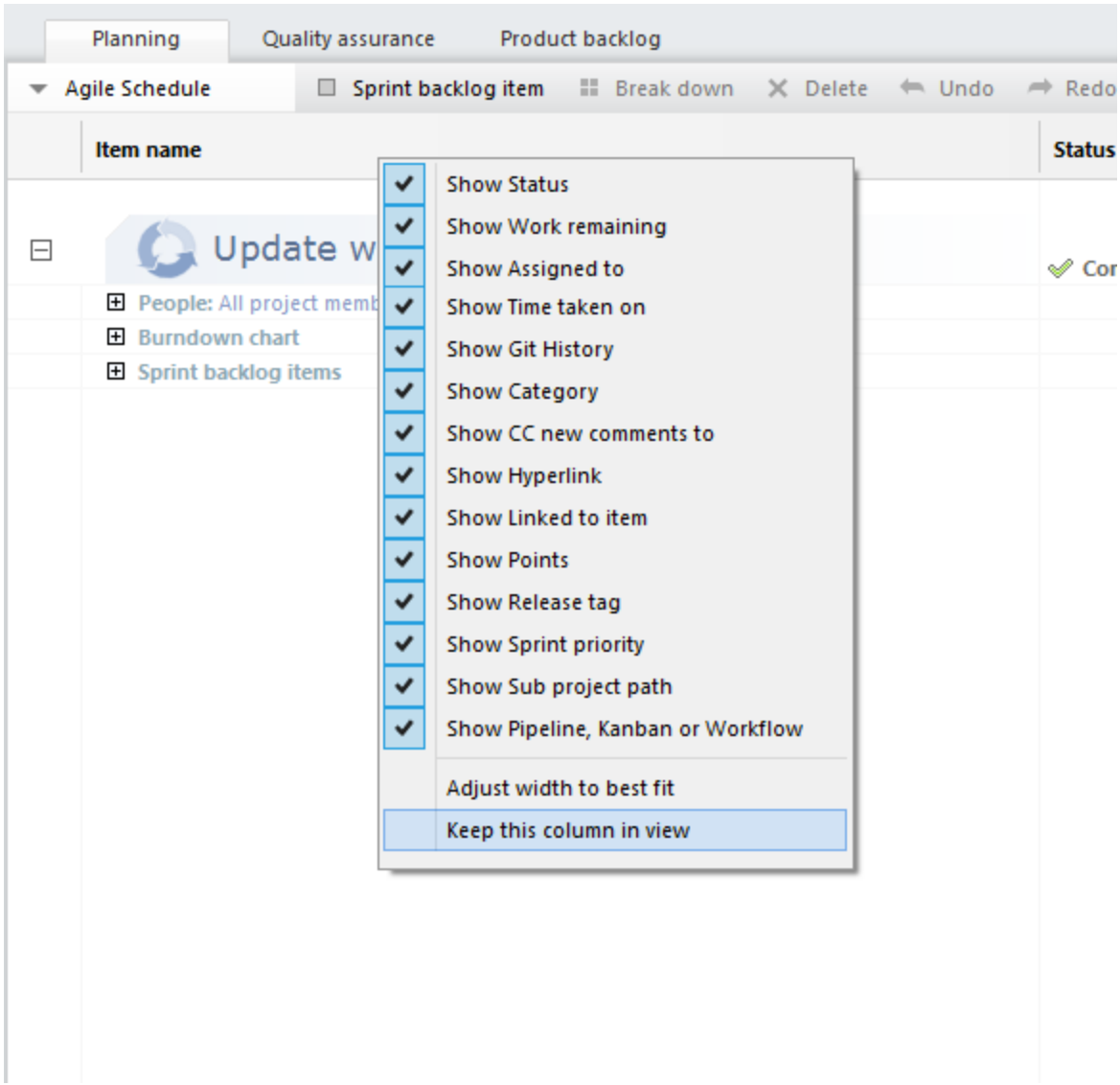
Custom columns types

·Text (plain single text line)
·Multiline text (edited in activity details window, in the same way as comments or user stories)
·Hyperlink (for external links)
·Drop list (for categories or other like "asset type" or "sign off")
·Number (1,2,3, will be summarized by top level items)
·Number with decimals (1.0, 2.0, will be summarized by top level items)
·Date (2008-05-16, select any date)

Keep this column in view

The "Keep this column in view" option is available for the "Item/Activity name" default column. The "Item name" column can be found when browsing either the planning view or the product backlog.

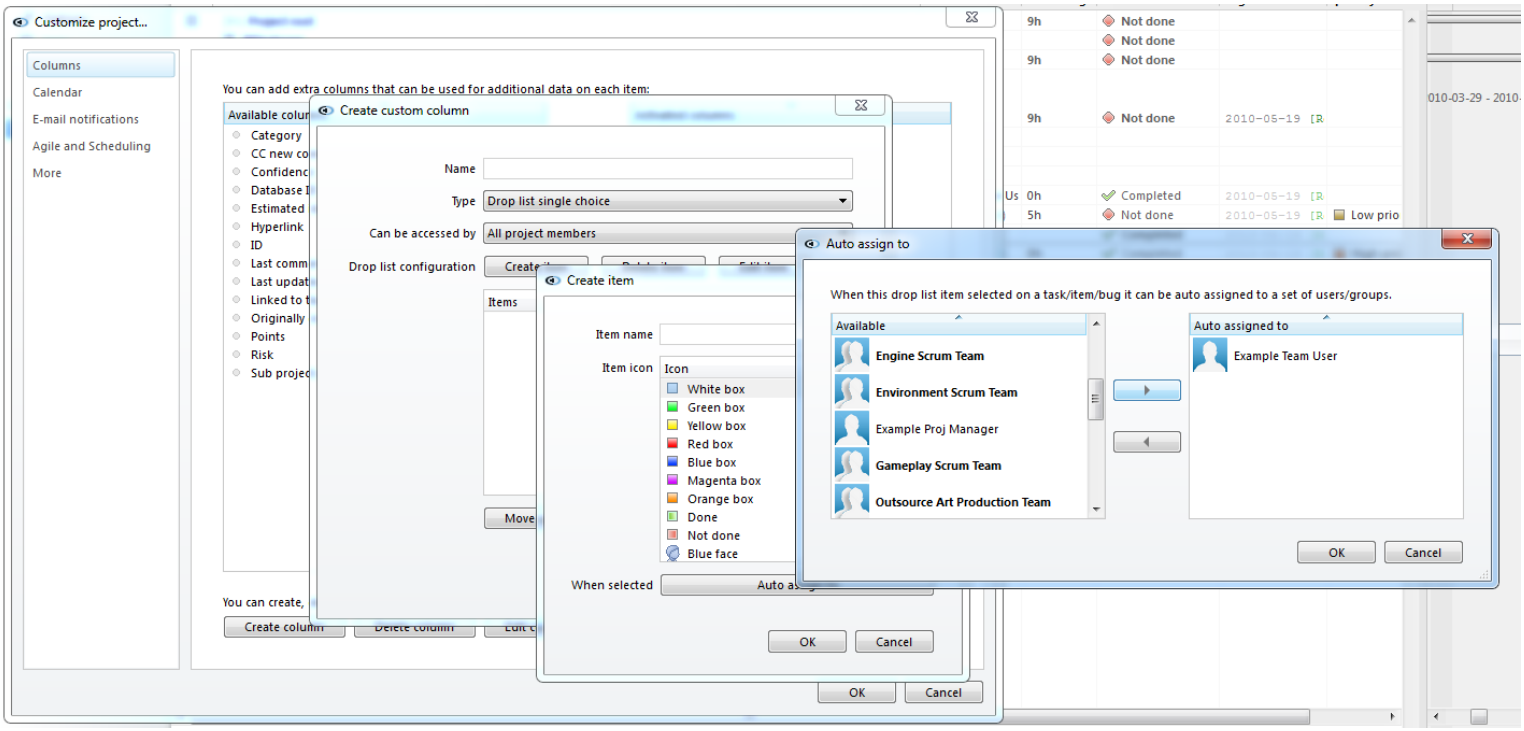
When selected, this option keeps the affected column in view at all times.



Right-click the "Item name" column to bring up the column drop-down menu.

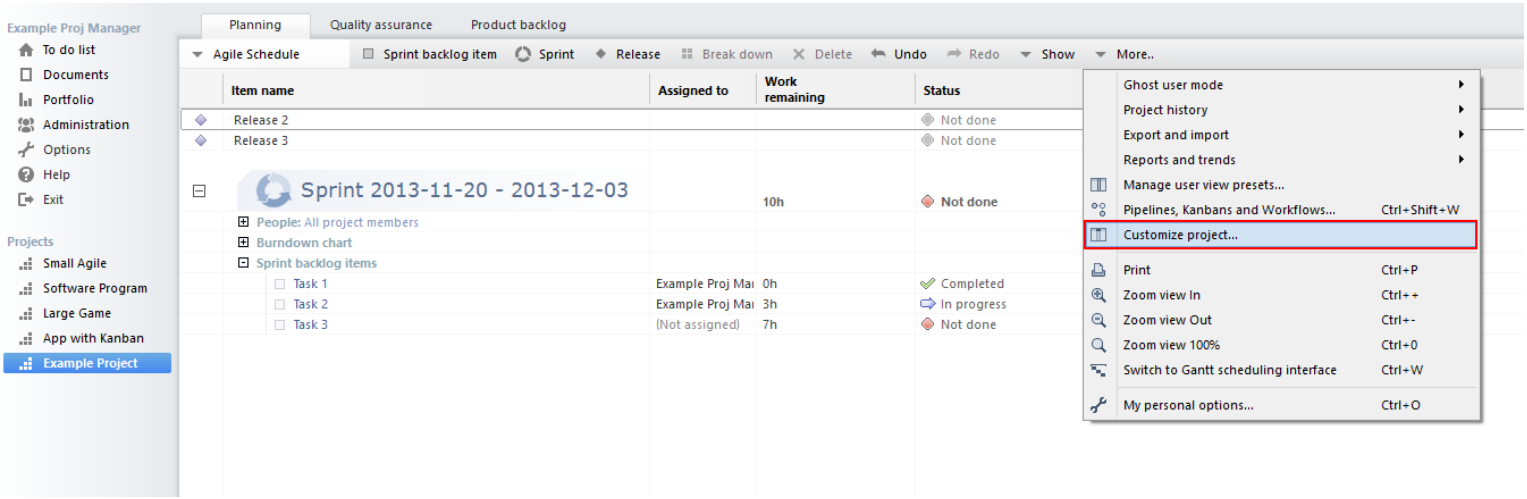
Special functionality in drop list item type

You can auto assign an task, item or bug to someone dependent on the selected drop list items (this can be used to assign a task, item or bug dependent on classification for example):

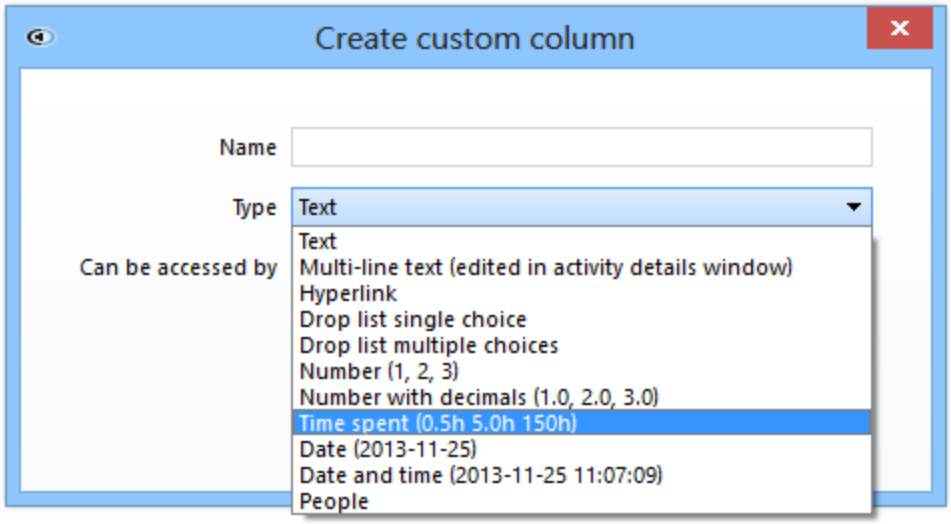


The Time spent custom column

The "Time spent" column's main purpose is to track how much time a user has spent on a specific task. This value can then be compared to the original estimate to see how accurate it was. Time spent is filled in manually by the assigned user.



To create a "Time spent" column go to your project, the schedule view, **More..>Customize project...** .

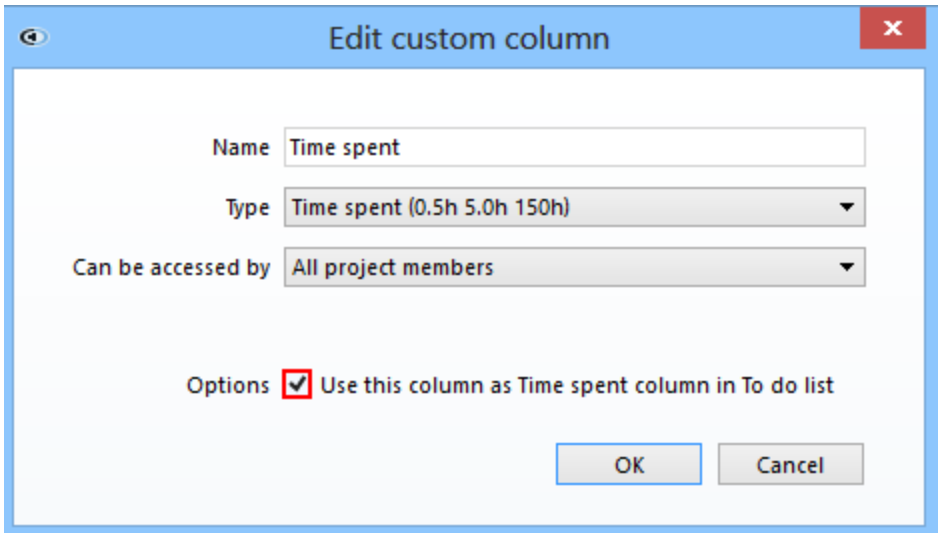


In the "Customize project..." window you can add new columns to your project.

Enabling the "Time spent" column in the To do list

There are a couple of prerequisites required in order to activate the "Time spent" column in the To do list. Start by creating a custom column of the type "Time spent" in your desired project. Remember to check the box "Use this column as Time spent column in To do list" while creating the custom column.

Note: If an item is part of a project that does not have a "Time spent" column(or if the column has not been activated), you will be unable to see time spent in your To do list.



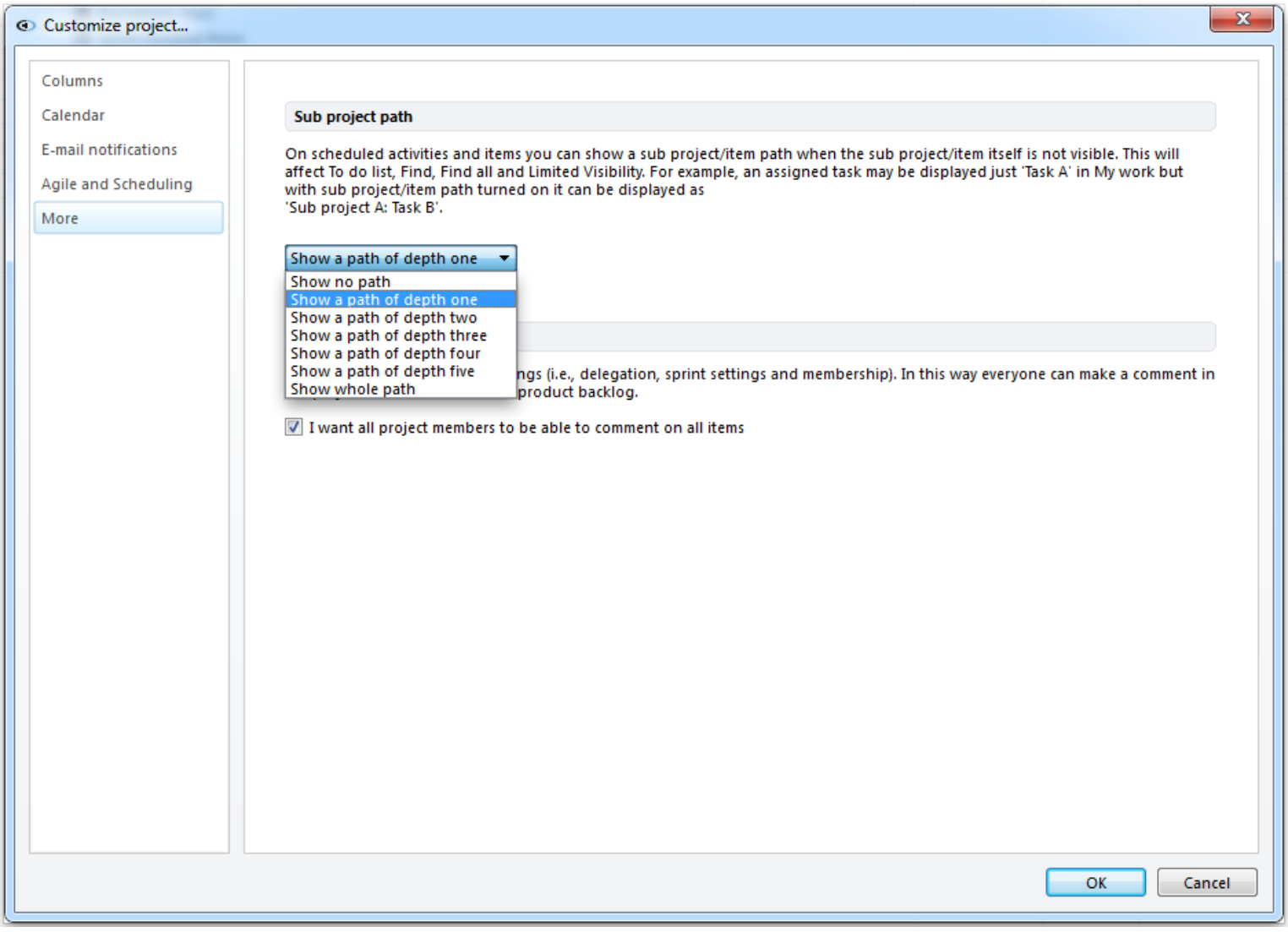
The "Edit custom column" dialog

Sub project/item path

It is important for all project members and managers to see the context of a task when it is not displayed in full within in the planning view.

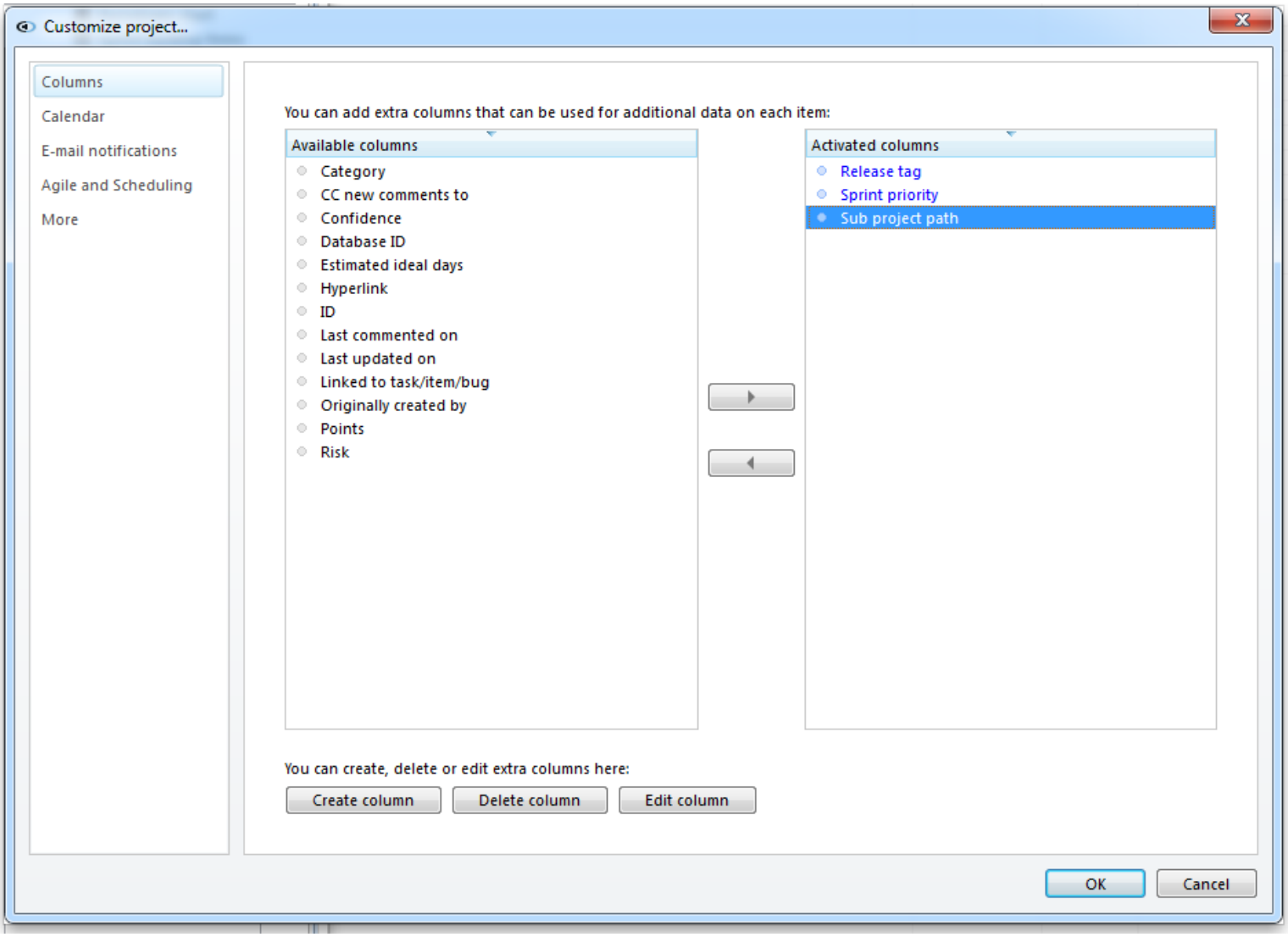
Hansoft has a solution to this called "sub project/item path". Basically, this means that tasks will be displayed as "Sub project A: Task B" instead of just "Task B" whenever Sub Project A is not visible. This is normally the case in the To do list, Find, Portfolio find and Limited Visibility.

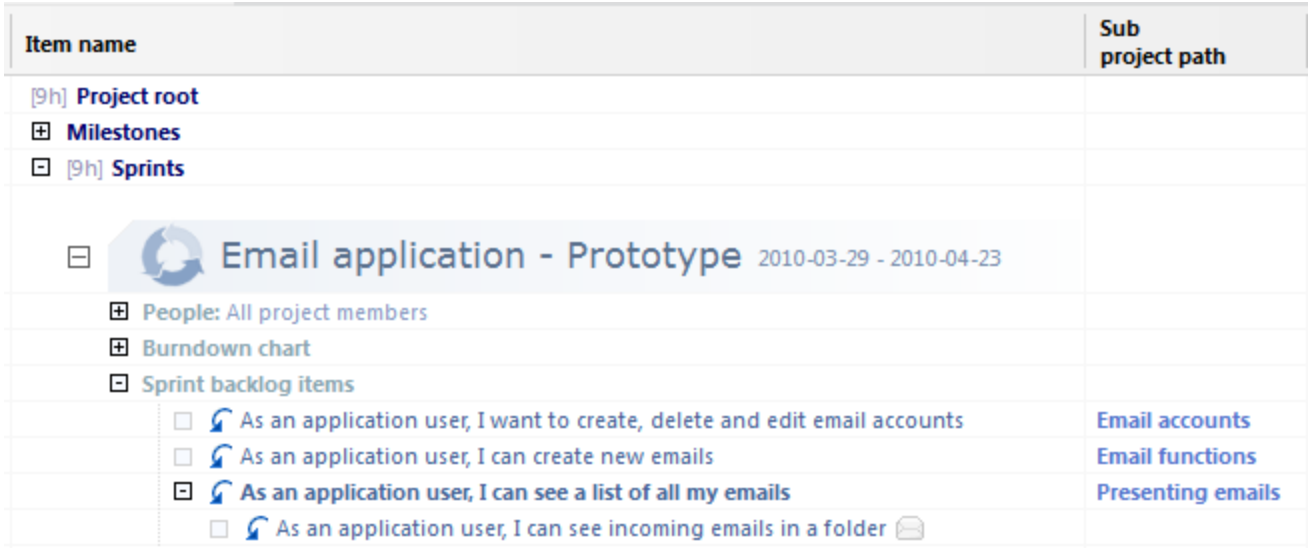
If you wish to set a custom setting on the path depth, click **More..>Customize project...**, and finally **More>Sub project/item path**.


Customize project...
Columns
Calendar
E-mail notifications
Agile and Scheduling
More
Sub project path
On scheduled activities and items you can show a sub project/item path when the sub project/item itself is not visible. This will affect To do list, Find, Find all and Limited Visibility. For example, an assigned task may be displayed just 'Task A' in My work but with sub project/item path turned on it can be displayed as
'Sub project A: Task B'.
Show a path of depth one
Show no path
Show a path of depth one
Show a path of depth two
Show a path of depth three
Show a path of depth four
Show a path of depth five
Show whole path
ngs (i.e., delegation, sprint settings and membership). In this way everyone can make a comment in
product backlog.
I want all project members to be able to comment on all items
OK
Cancel

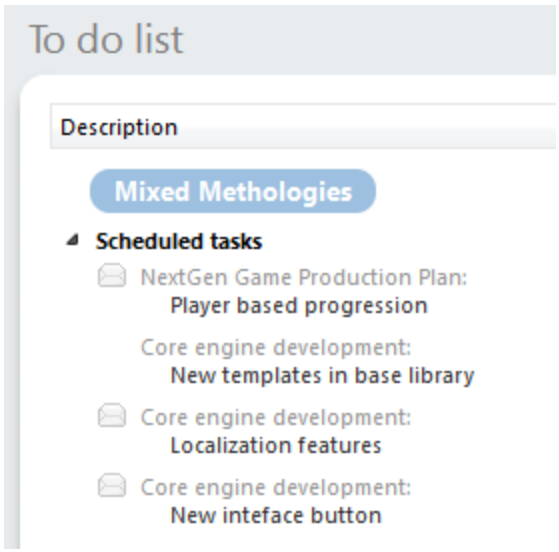
If you have a path of depth two and tasks and backlog items, they will be displayed like this in...

Sub project path can be shown in a separate column (as opposed to before Item name). Activate the pre created column "Sub project path":

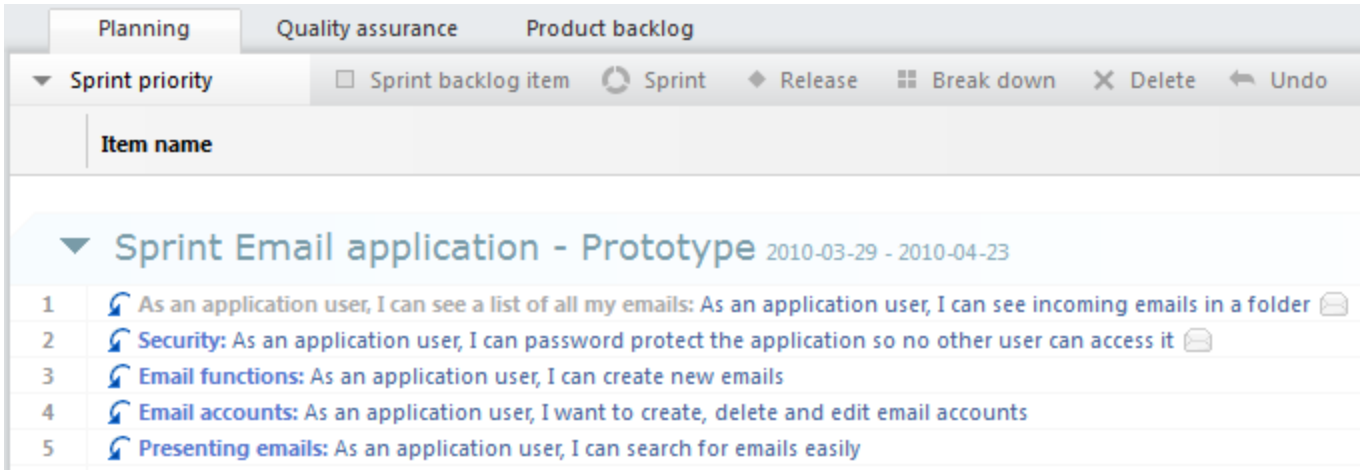



Item name
Sub project path
[9h] Project root
Milestones
[9h] Sprints
Email application - Prototype 2010-03-29 - 2010-04-23
People: All project members
Burndown chart
Sprint backlog items
As an application user, I want to create, delete and edit email accounts
Email accounts
As an application user, I can create new emails
Email functions
As an application user, I can see a list of all my emails
Presenting emails
As an application user, I can see incoming emails in a folder

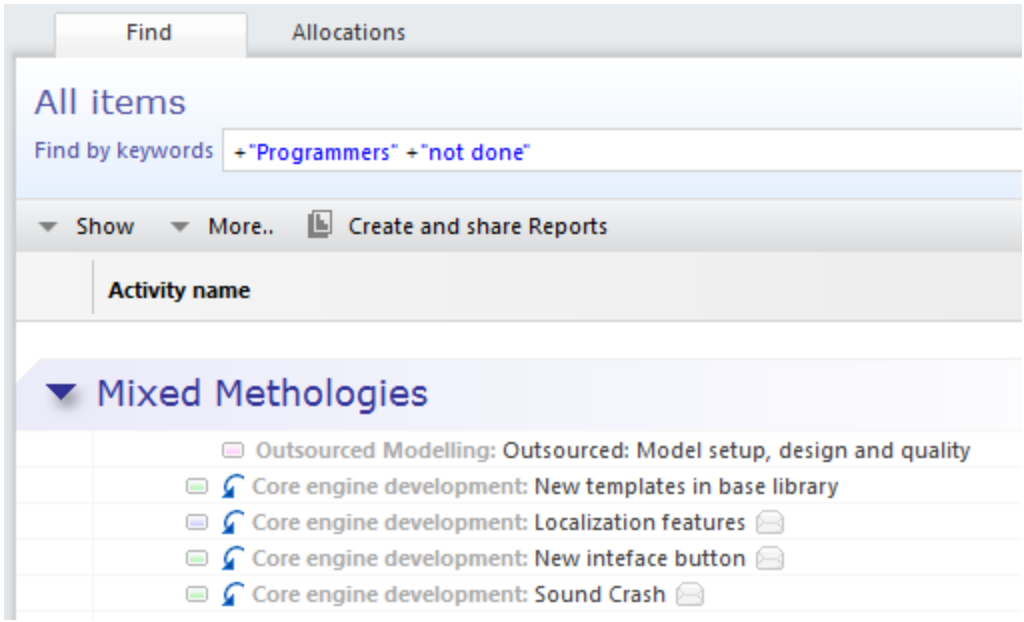
To do (path seen in gray):



Prioritized (path seen in blue and gray):


Planning
Quality assurance
Product backlog
Sprint priority
Sprint backlog item
Sprint
Release
Break down
Delete
Undo
Item name
Sprint Email application - Prototype 2010-03-29 - 2010-04-23
1 As an application user, I can see a list of all my emails: As an application user, I can see incoming emails in a folder
2 Security: As an application user, I can password protect the application so no other user can access it
3 Email functions: As an application user, I can create new emails
4 Email accounts: As an application user, I want to create, delete and edit email accounts
5 Presenting emails: As an application user, I can search for emails easily

Portfolio find (path seen in gray):

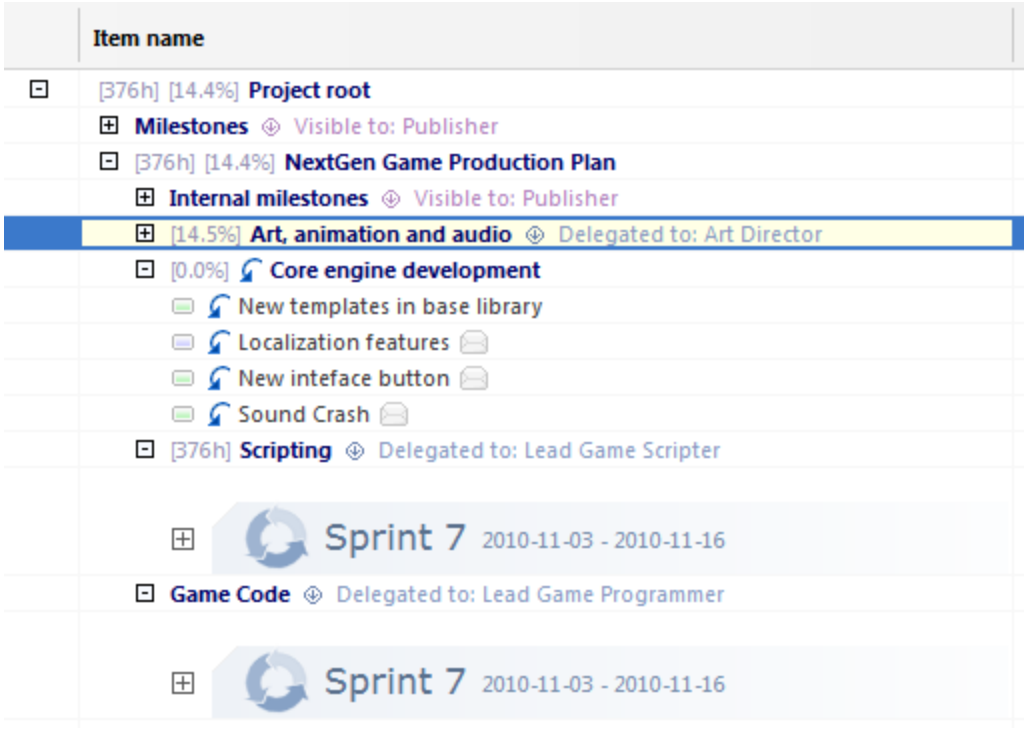


Delegation and limited visibillity

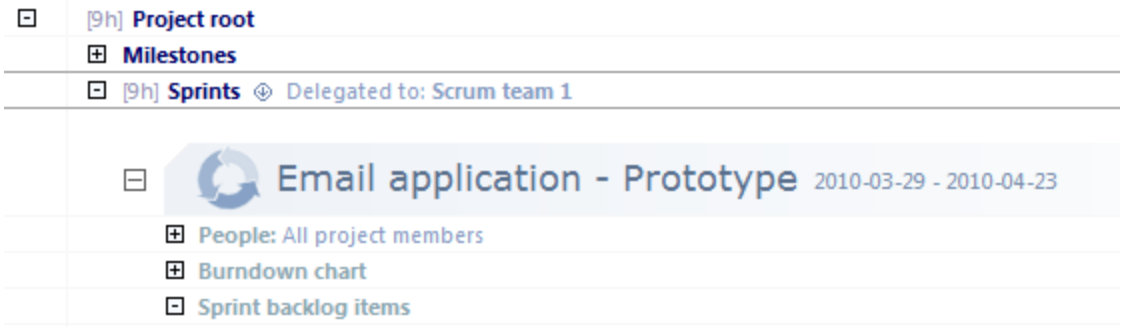
Delegation and limited visibility on sub-project/items are vital components in structuring and organizing projects and how each team member fits in within the project schedule, sprints and backlogs.

Delegation

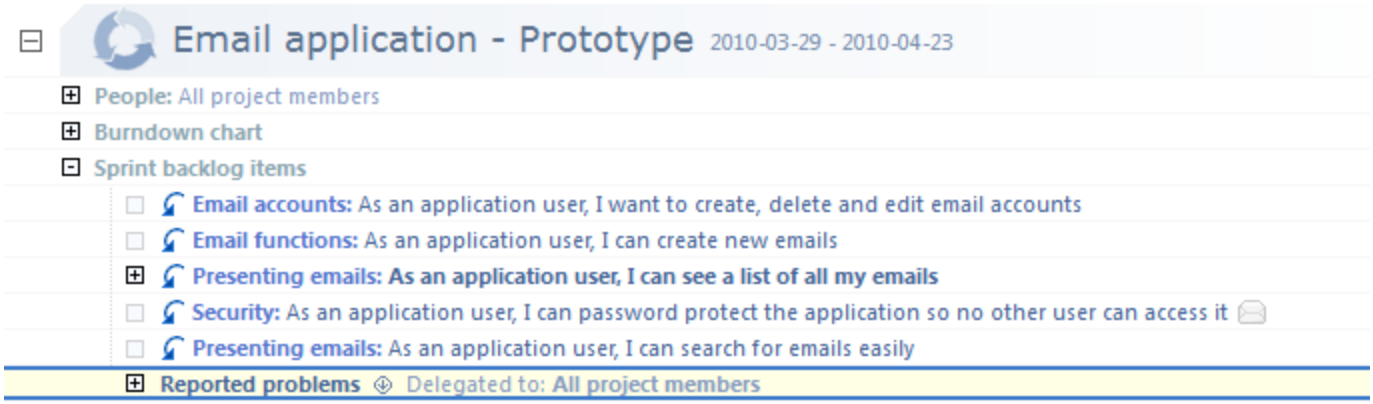
If you delegate a sub-project, a task item or backlog item to a user (or a group of users) they have the ability to create, delete and change everything below the sub-project. Tasks can be broken down, added and removed. A main project manager can, in this way, keep the control over the whole project by letting sub-project managers take control over some parts. In larger projects, this is often necessary to make the project and its organization effective. Delegating is done by right-clicking on an item or sub-project and selecting **Delegate to...**


Item name
[376h] [14.4%] Project root
Milestones Visible to: Publisher
[376h] [14.4%] NextGen Game Production Plan
Internal milestones Visible to: Publisher
[14.5%] Art, animation and audio Delegated to: Art Director
[0.0%] Core engine development
New templates in base library
Localization features
New inteface button
Sound Crash
[376h] Scripting Delegated to: Lead Game Scripter
Sprint 7 2010-11-03 - 2010-11-16
Game Code Delegated to: Lead Game Programmer
Sprint 7 2010-11-03 - 2010-11-16

Delegating a part of a scheduling project



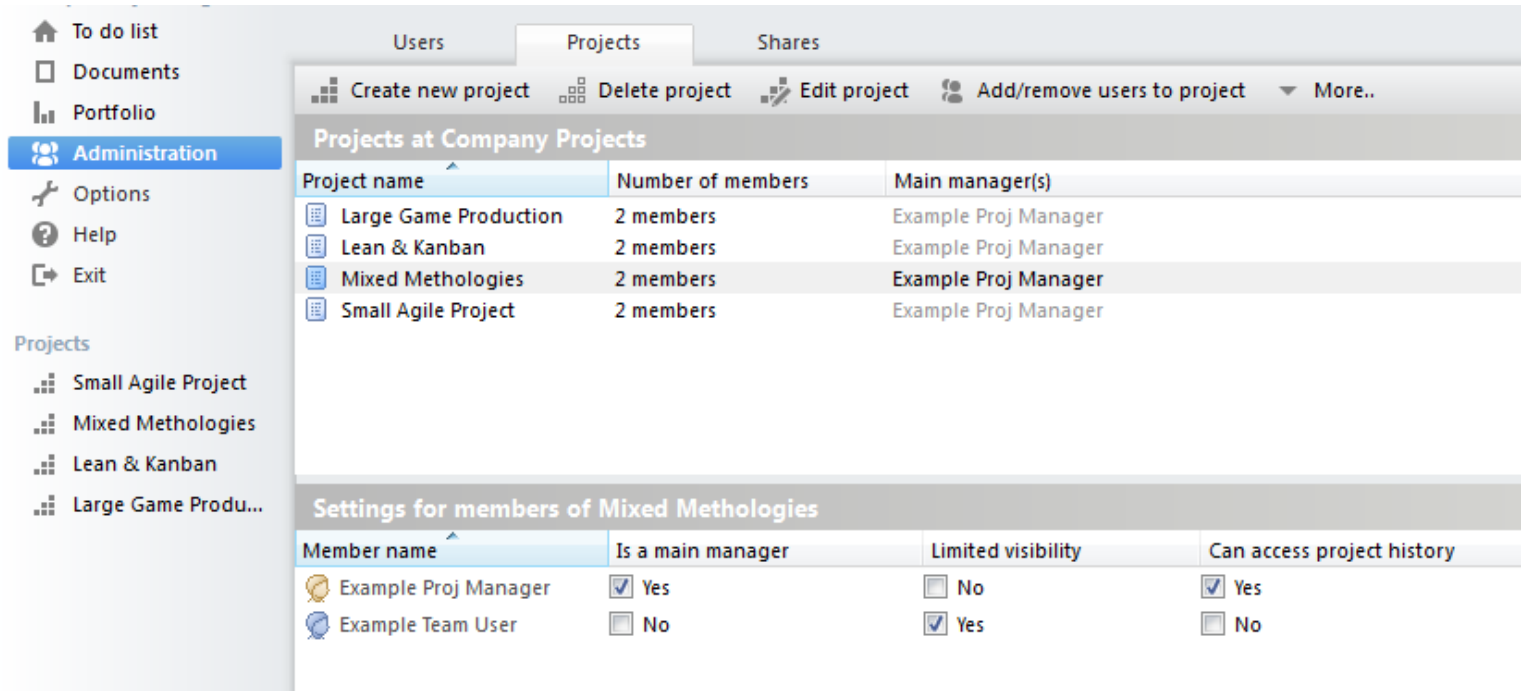
Delegation to a whole scrum team in agile

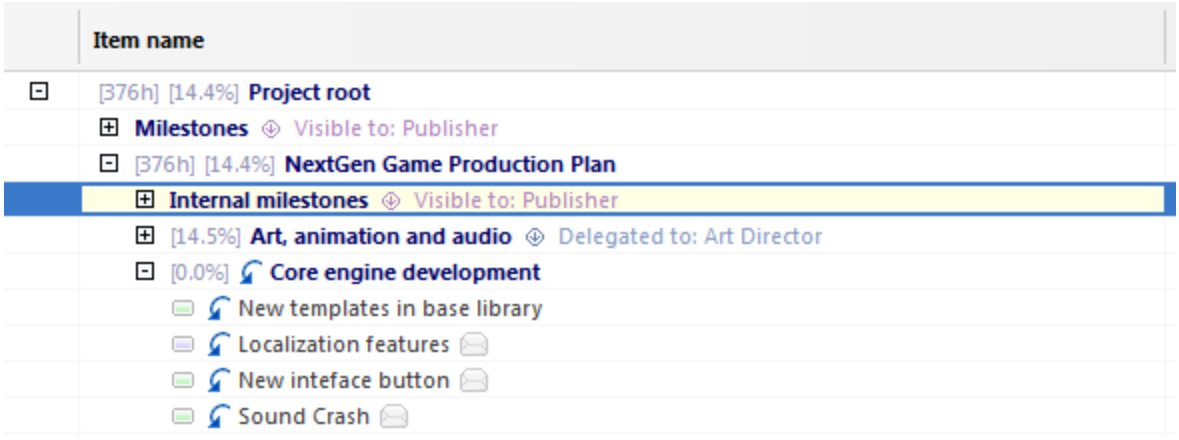

Email application - Prototype 2010-03-29 - 2010-04-23
People: All project members
Burndown chart
Sprint backlog items
Email accounts: As an application user, I want to create, delete and edit email accounts
Email functions: As an application user, I can create new emails
Presenting emails: As an application user, I can see a list of all my emails
Security: As an application user, I can password protect the application so no other user can access it
Presenting emails: As an application user, I can search for emails easily
Reported problems Delegated to: All project members

Delegation example of the backlog in an agile project

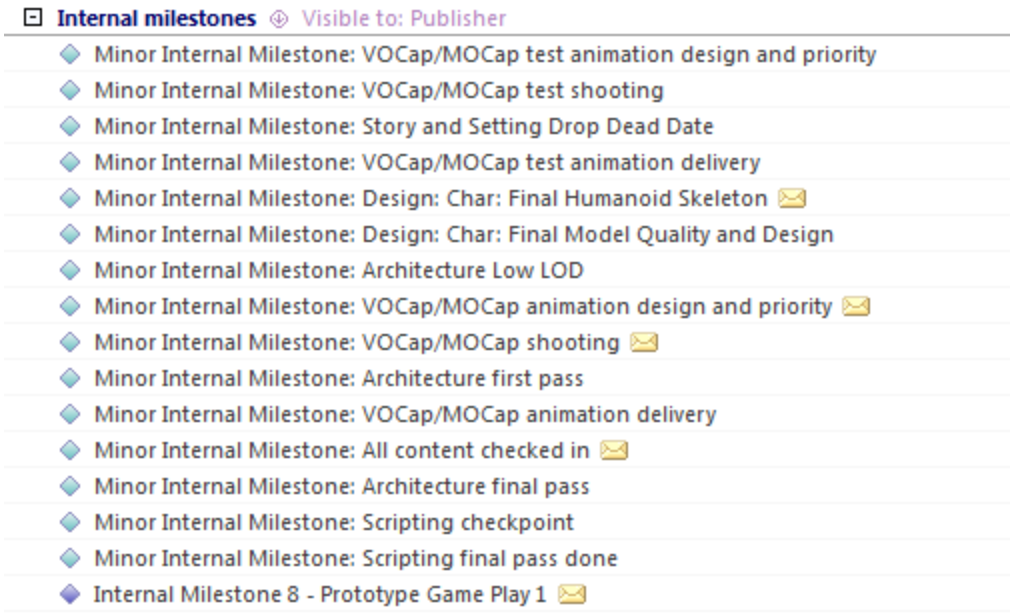
Limited visibility

Limited visibility is vital if, for example, you want to connect outsourcing partners or other external project partners and let them see only a part of the project. First you have to set the "Limited visibility" flag under "Administration", "Projects" and **Settings for members of...** for the user that limited visibility should affect. Right click on a sub-project or backlog item and click on **Visible to...**.




Item name
[376h] [14.4%] Project root
Milestones Visible to: Publisher
[376h] [14.4%] NextGen Game Production Plan
Internal milestones Visible to: Publisher
[14.5%] Art, animation and audio Delegated to: Art Director
[0.0%] Core engine development
New templates in base library
Localization features
New inteface button
Sound Crash

Setting Limited visibility on internal releases


Internal milestones Visible to: Publisher
Minor Internal Milestone: VOCap/MOCap test animation design and priority
Minor Internal Milestone: VOCap/MOCap test shooting
Minor Internal Milestone: Story and Setting Drop Dead Date
Minor Internal Milestone: VOCap/MOCap test animation delivery
Minor Internal Milestone: Design: Char: Final Humanoid Skeleton
Minor Internal Milestone: Design: Char: Final Model Quality and Design
Minor Internal Milestone: Architecture Low LOD
Minor Internal Milestone: VOCap/MOCap animation design and priority
Minor Internal Milestone: VOCap/MOCap shooting
Minor Internal Milestone: Architecture first pass
Minor Internal Milestone: VOCap/MOCap animation delivery
Minor Internal Milestone: All content checked in
Minor Internal Milestone: Architecture final pass
Minor Internal Milestone: Scripting checkpoint
Minor Internal Milestone: Scripting final pass done
Internal Milestone 8 - Prototype Game Play 1

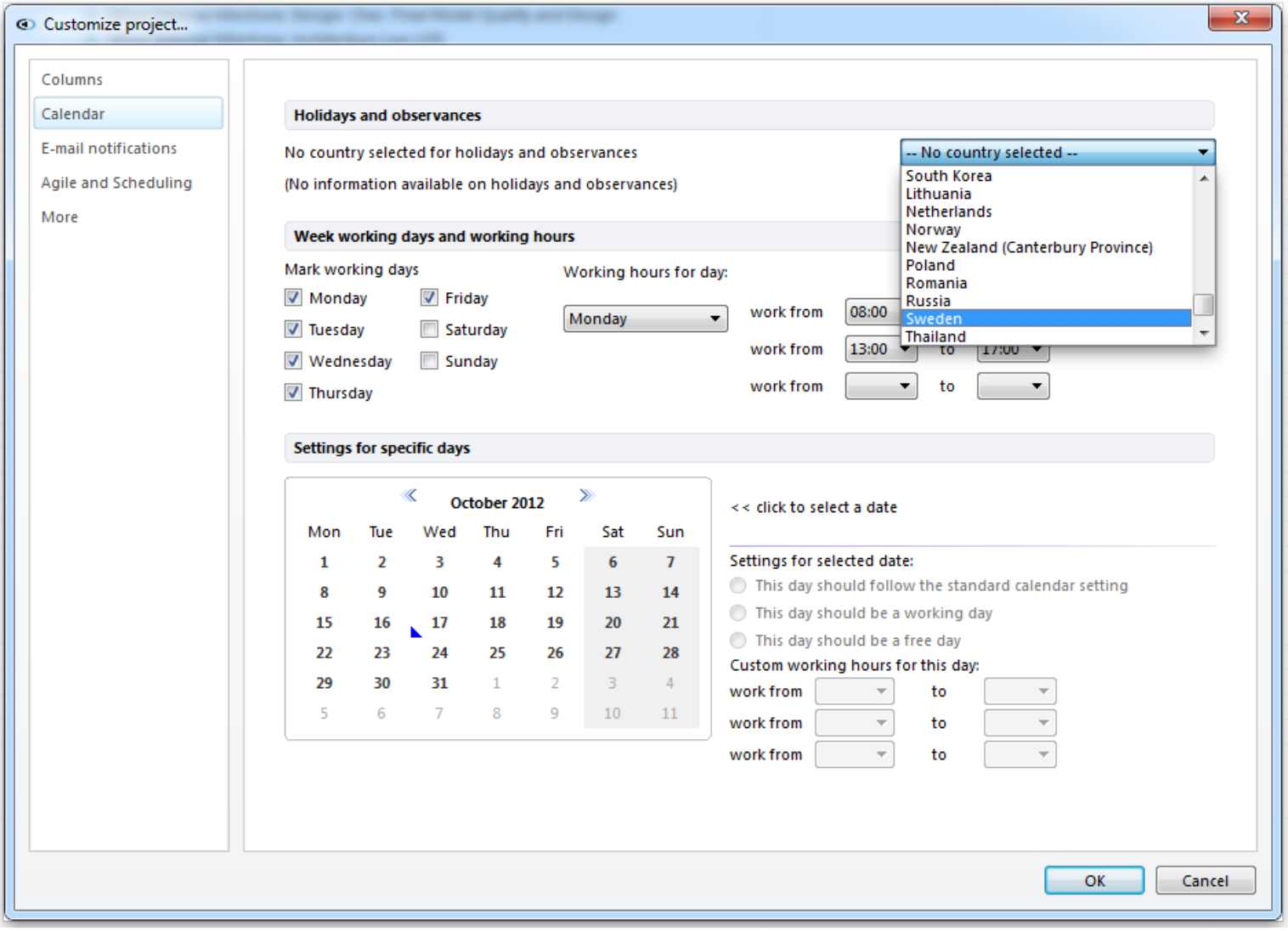
How Limited visibility will affect the Publisher

Calendar and working hours

One important aspect when making the project plan is to set the working days and working hours. That is done in the Calendar & working hours window.

Opening the window

Navigate to **More..>Customize project...**, and then choose "Calendar" to the left.



The window is split up in three parts: Holidays and observances, Week working days and working hours and Settings for specific days.

In the Holidays and observances part of the window, you select the country which most closely matches your local holidays and observances. Holidays of that country will be marked red in the calendar, and will also be shown in the To do list, and in Project Overview.

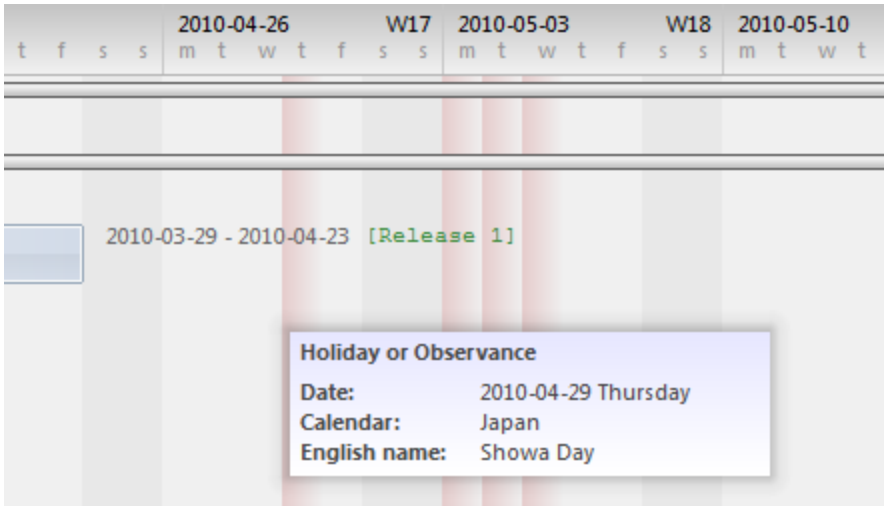
In the Week working days and working hours you set the week's general working days as well as the general working hours for the week. Free days are marked gray in the Calendar and are also shown in the To do list and in Portfolio find.

In Settings for specific days you determine any special settings for a day that should overrule the general settings made in the Week working days and working hours part of the window. The days you have

changed will be marked green for a free day/working day change, and red for a change in working hours (in this calendar window only).

Note: The calendar setting applies to the whole project.

An example using the calendar settings for the Japan within a project (holidays are denoted by red bars):



Working hours

Changing working hours in a project changes the allocation (in hours, not percentage) of the users that have assigned tasks in that project.

If we have set a six-hour working day, and allocate the user to a capacity of 50% in this project, this would indicate that the user has to work three hours a day on this task. An eight-hour working day with a 50% allocation would indicate four hours of work on this task per day.

Out of office/vacation/holiday planning and part time work

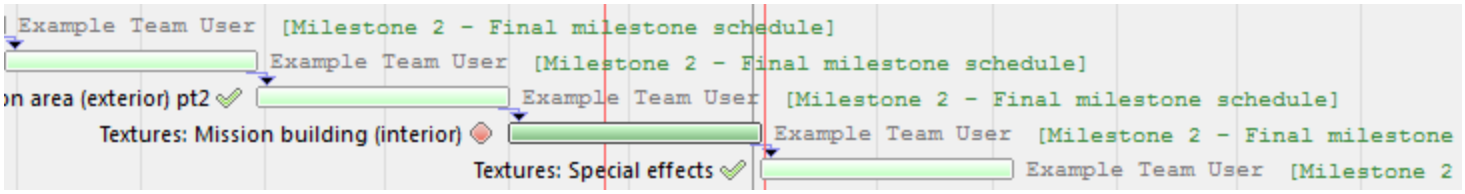
Hansoft has powerful features for out of office/vacation/holiday planning and part time work individual users that affect both scheduled and agile projects.

One of the most important aspects of our out of office planning and part time work is that it is global (affecting all projects) once you set it up in one project.

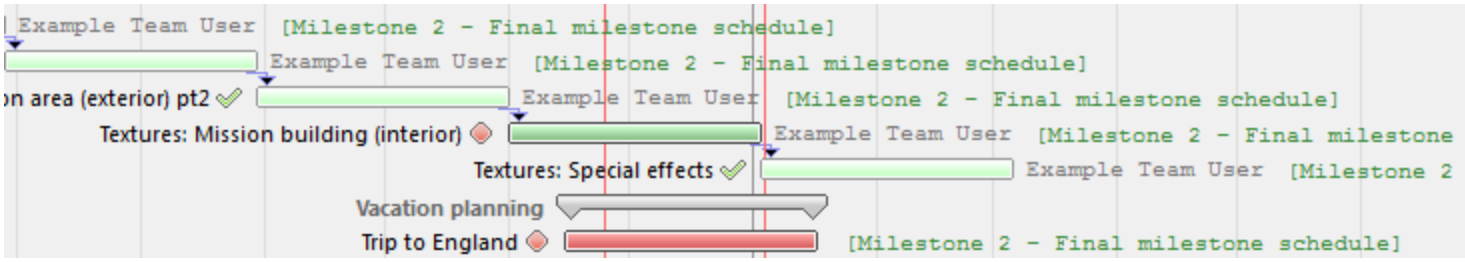
Be careful when changing out of office planning! If handled incorrectly, it can destroy schedules and dependencies because of its auto-adjustment functionality.

Out of office planning

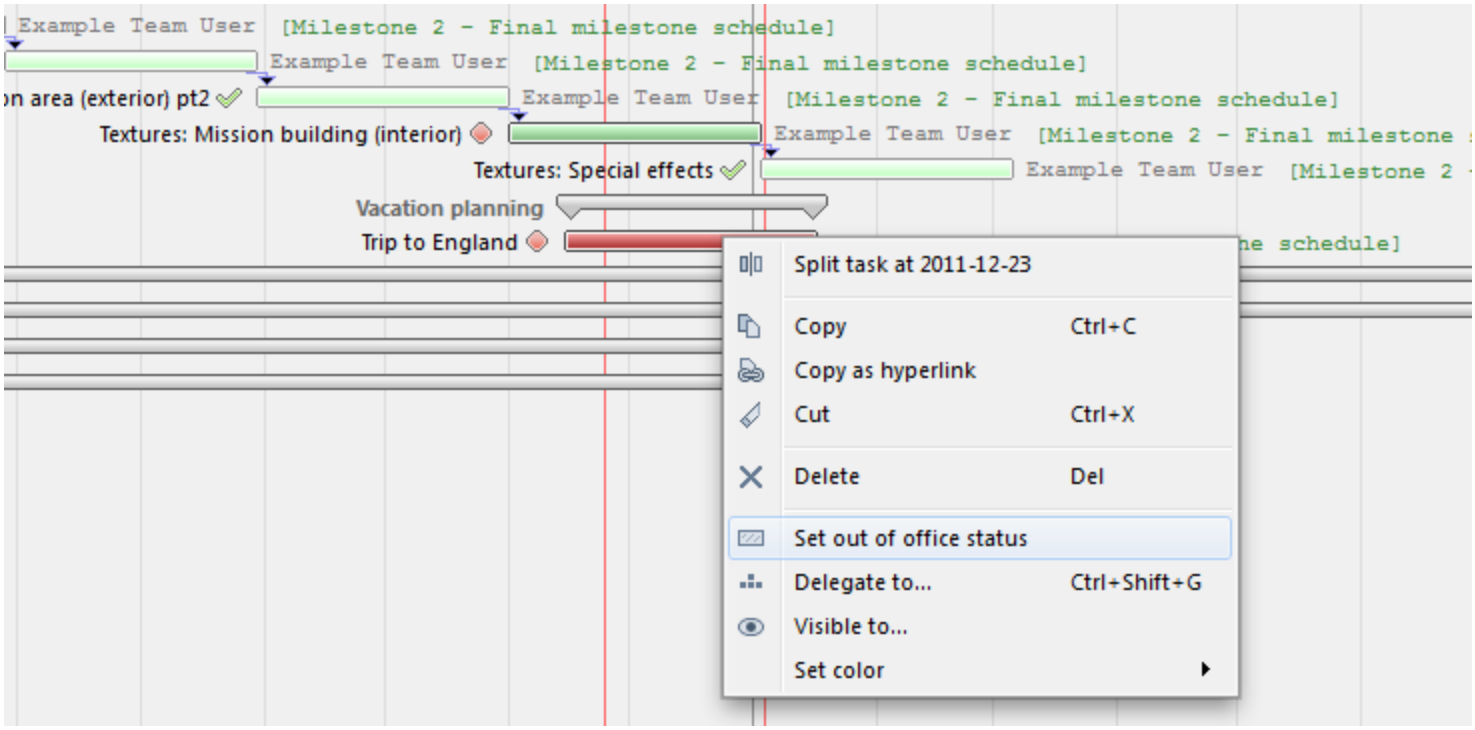
We have a schedule made for "Example Team User" that looks like this:


Example Team User [Milestone 2 - Final milestone schedule]
Example Team User [Milestone 2 - Final milestone schedule]
n area (exterior) pt2
Example Team User [Milestone 2 - Final milestone schedule]
Textures: Mission building (interior)
Example Team User [Milestone 2 - Final milestone
Textures: Special effects
Example Team User [Milestone 2

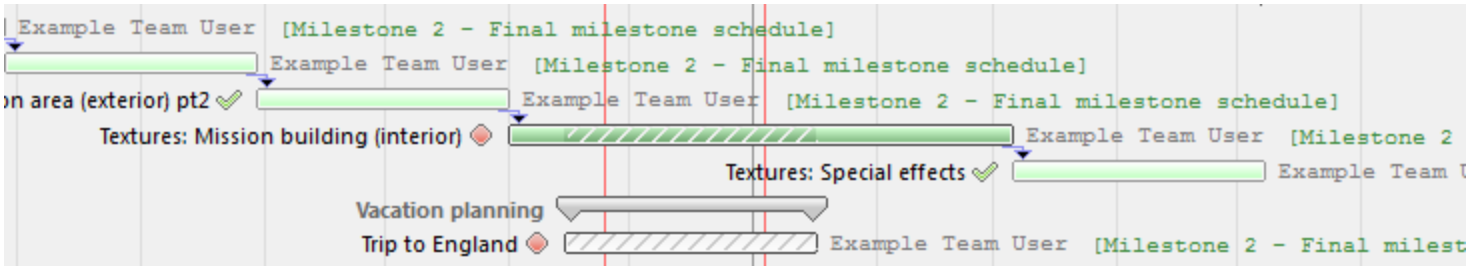
We decide that "Example Team User" should go to England (red bar) and this creates a normal planned task for when he is gone:


Example Team User [Milestone 2 - Final milestone schedule]
Example Team User [Milestone 2 - Final milestone schedule]
n area (exterior) pt2
Example Team User [Milestone 2 - Final milestone schedule]
Textures: Mission building (interior)
Example Team User [Milestone 2 - Final milestone
Textures: Special effects
Example Team User [Milestone 2
Vacation planning
Trip to England
[Milestone 2 - Final milestone schedule]

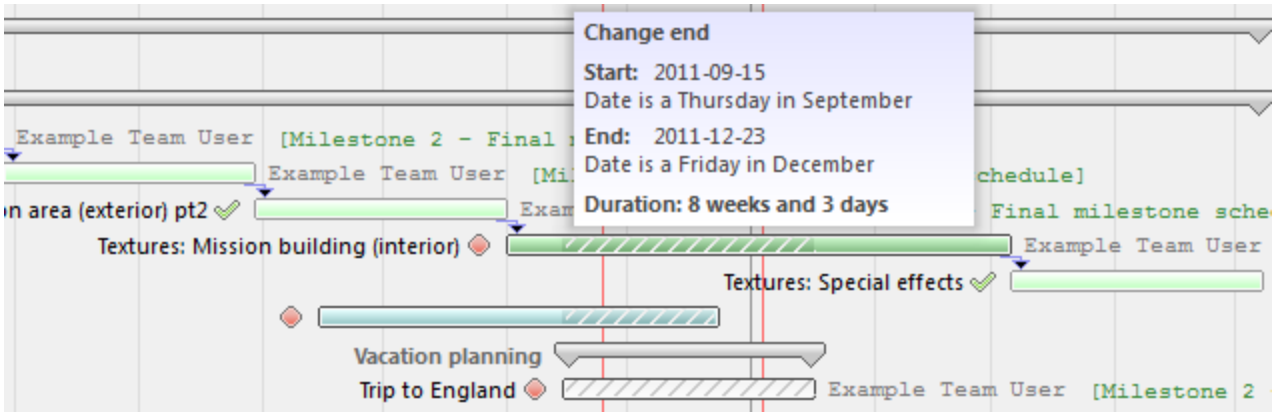
We right click on "Trip to England" and choose "Set out of office status on task(s)":


Example Team User [Milestone 2 - Final milestone schedule]
Example Team User [Milestone 2 - Final milestone schedule]
n area (exterior) pt2
Example Team User [Milestone 2 - Final milestone schedule]
Textures: Mission building (interior)
Example Team User [Milestone 2 - Final milestone
Textures: Special effects
Example Team User [Milestone 2
Vacation planning
Trip to England
Split task at 2011-12-23
Copy Ctrl+C
Copy as hyperlink
Cut Ctrl+X
Delete Del
Set out of office status
Delegate to... Ctrl+Shift+G
Visible to...
Set color

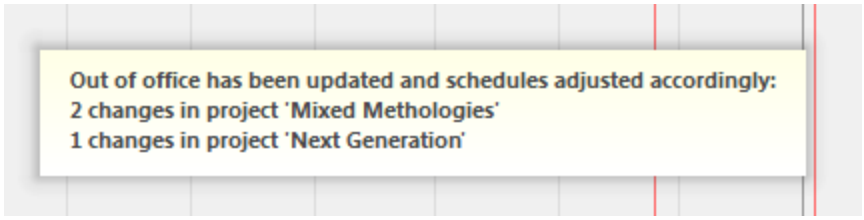
"Trip to England" is now an out of office task (visualized by thick gray diagonal lines). The task is also assigned to Example Team User. The schedule has now been automatically adjusted and the task "Code: Functions" has been extended in time without adding extra working days:


Example Team User [Milestone 2 - Final milestone schedule]
Example Team User [Milestone 2 - Final milestone schedule]
n area (exterior) pt2
Example Team User [Milestone 2 - Final milestone schedule]
Textures: Mission building (interior)
Example Team User [Milestone 2
Textures: Special effects
Vacation planning
Trip to England
Example Team User [Milestone 2 - Final milest

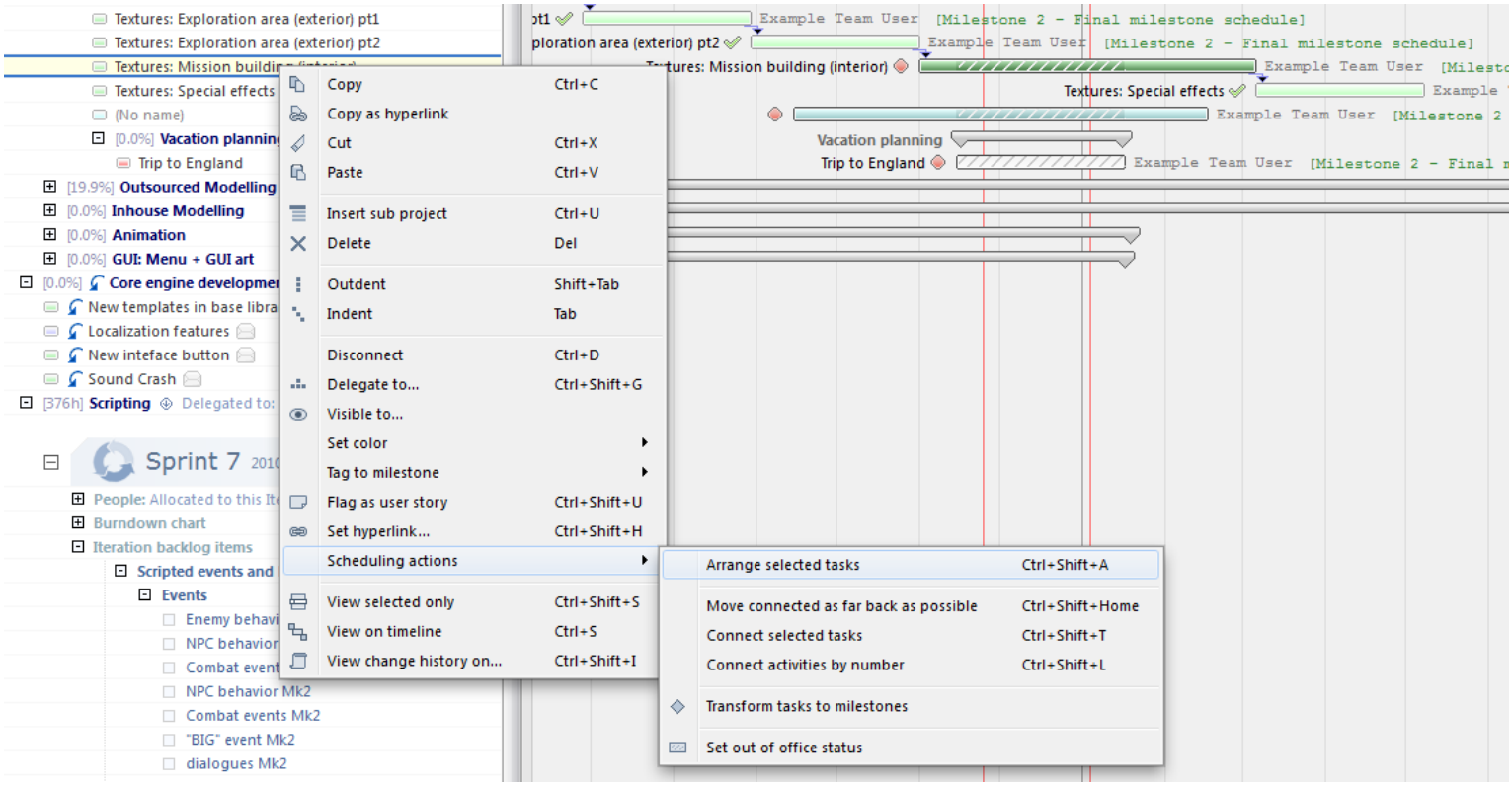
Out of office task "Trip to England" is now global (affecting all projects). Thus, when we create, drag, extend or change a user on a normal planned task, it will be directly affected by the out of office task:



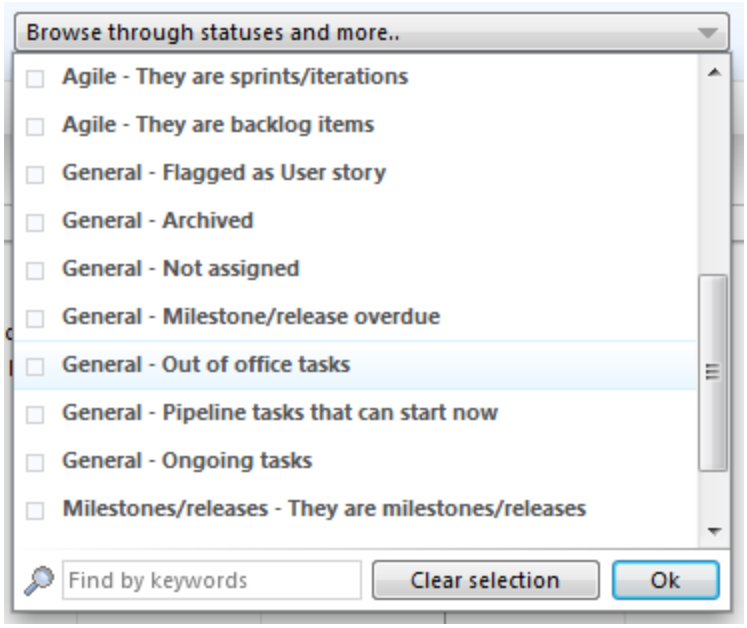
When updating out of office planning, please notice which projects that have been affected by the planning changes:


Out of office has been updated and schedules adjusted accordingly:
2 changes in project 'Mixed Methologies'
1 changes in project 'Next Generation'

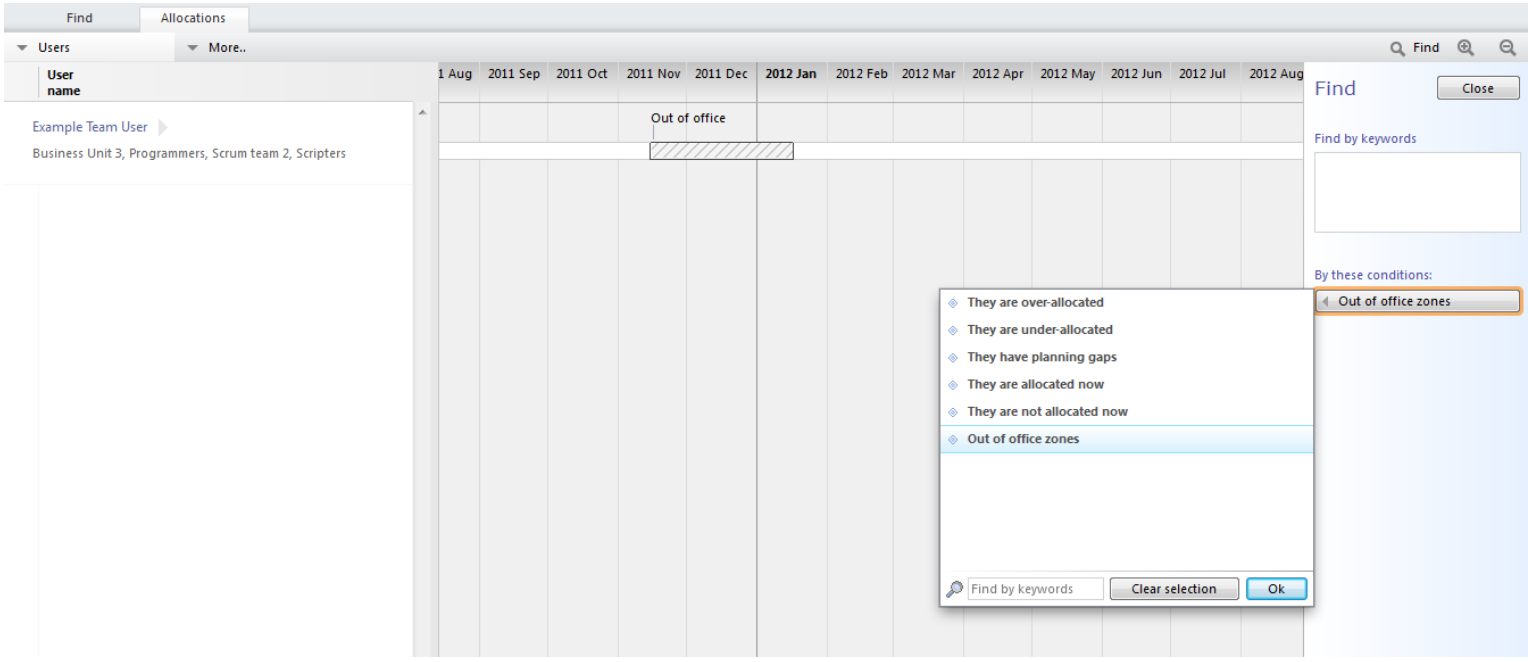
If you arrange tasks (Ctrl + Shift + A, or Cmd + Shift + A), they will be adjusted in accordance with out of office planning.



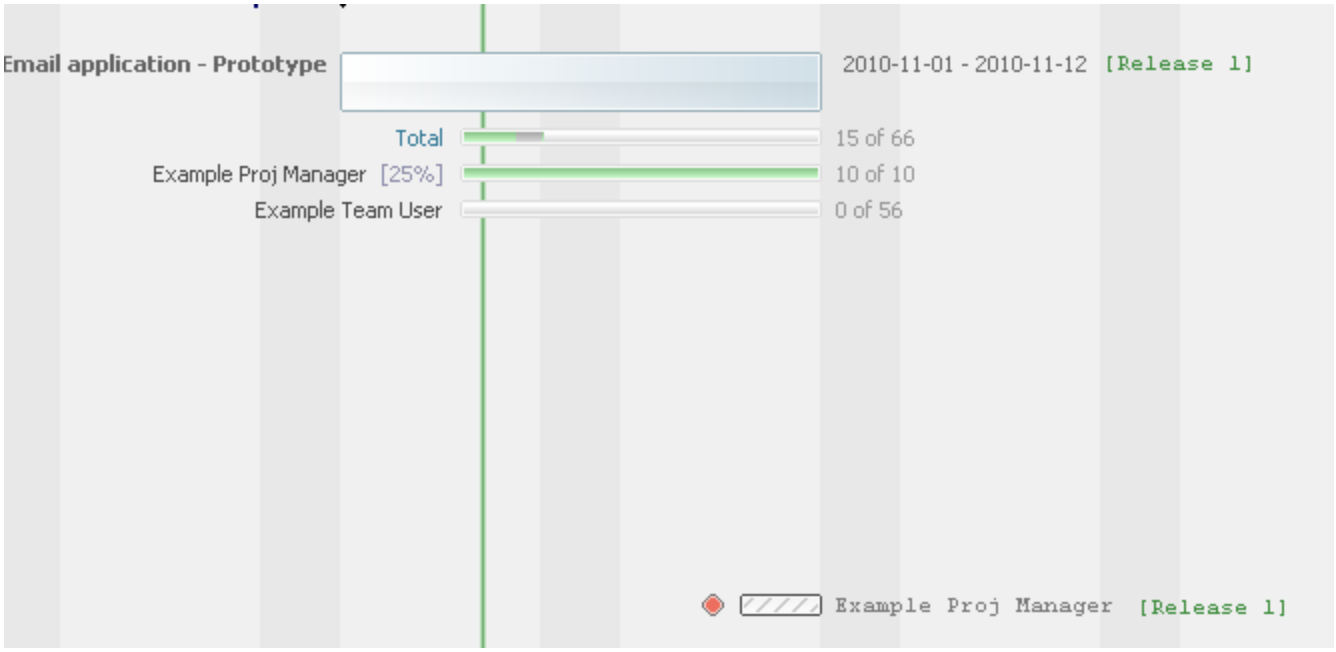
All out of office planning in all projects can be summarized in "Portfolio find", by choosing condition and "They are out of office tasks":


Browse through statuses and more..
Agile - They are sprints/iterations
Agile - They are backlog items
General - Flagged as User story
General - Archived
General - Not assigned
General - Milestone/release overdue
General - Out of office tasks
General - Pipeline tasks that can start now
General - Ongoing tasks
Milestones/releases - They are milestones/releases
Find by keywords
Clear selection
Ok

All out of office tasks are also visible in all Portfolio allocations views. You can choose to view only out of office zones by clicking on "They are out of office zones" in user find:

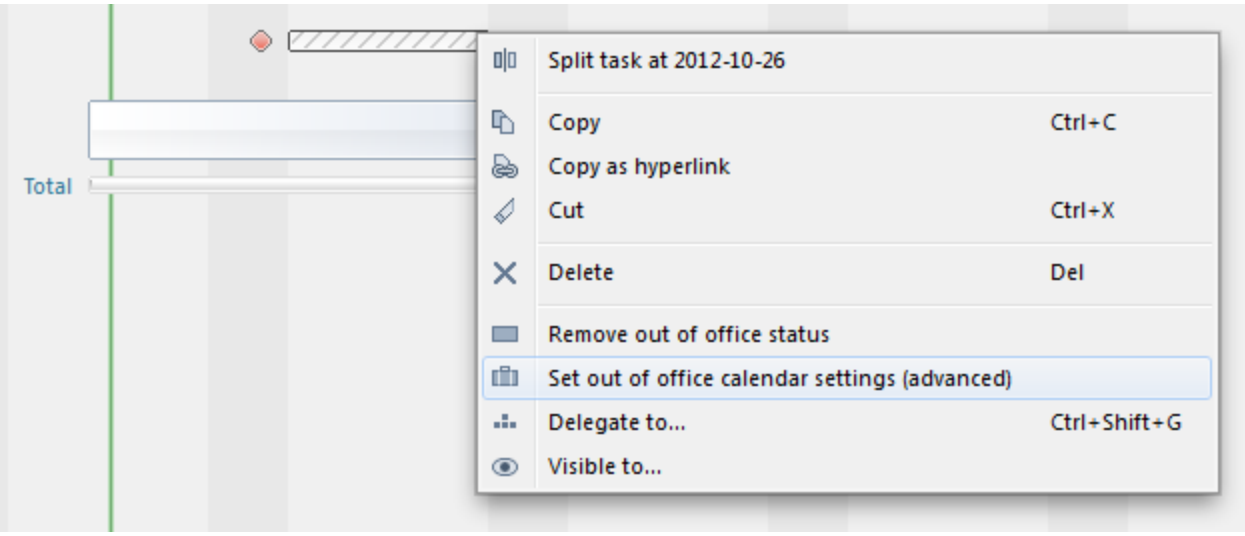


Out of office tasks affect sprints/iterations if they are "inside" them.

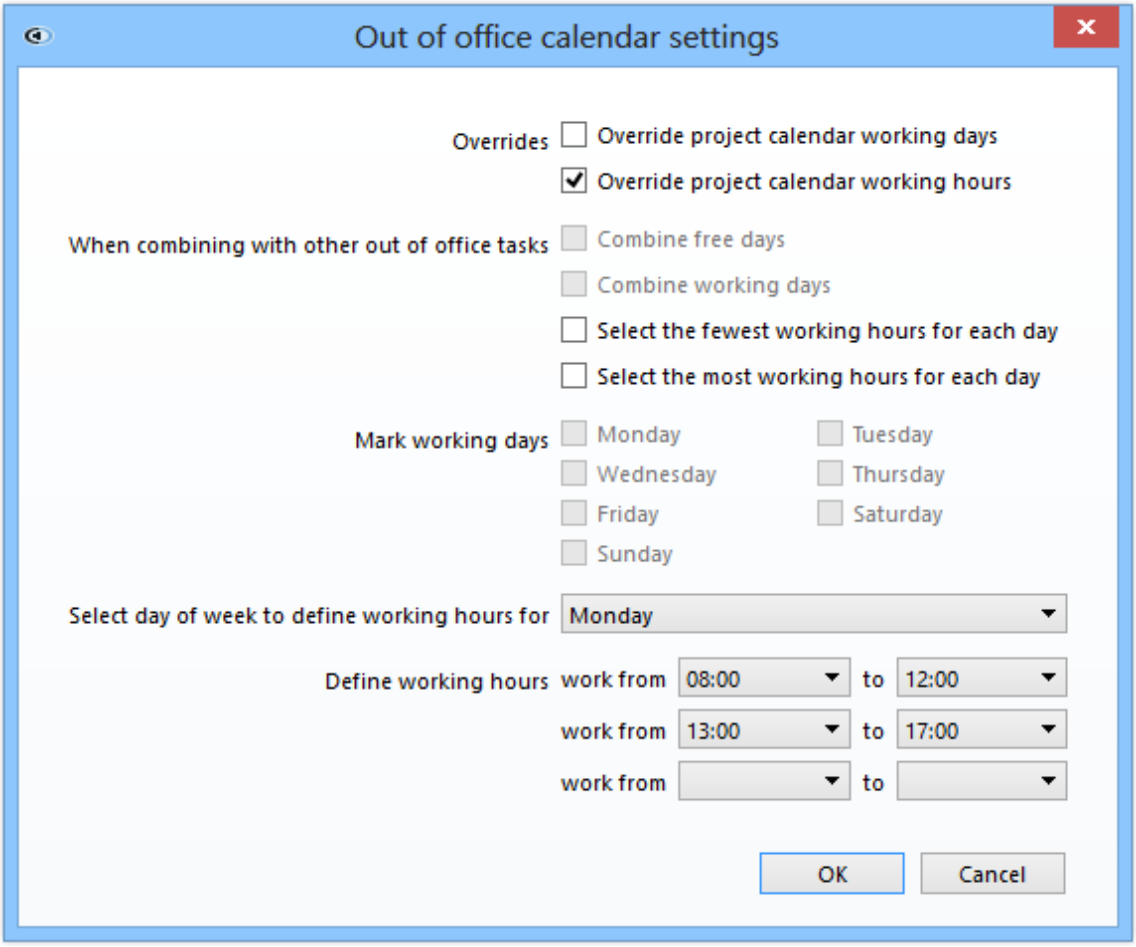


Part-time work

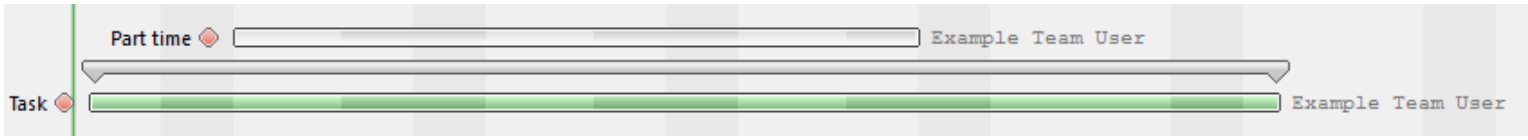
You can also create a period of time in which a user is working part time. Create an out of office task, right click and select "Set out of office calendar settings".



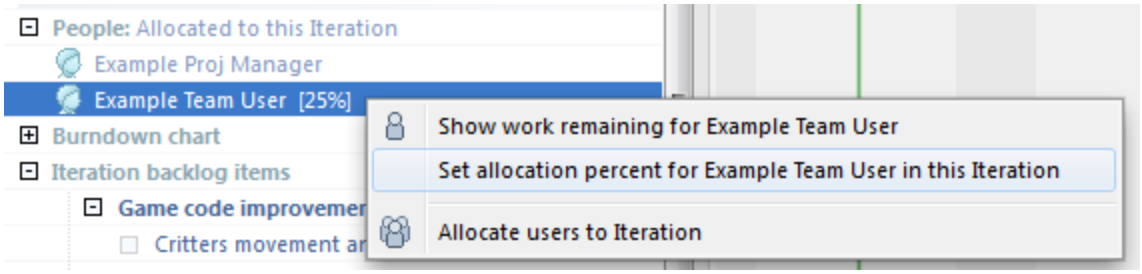
You can now transform this out of office task to a part time calendar for an individual user by overriding the project calendar. After this change, all schedules will auto-adjust to the new settings in the same way as out of office planning. Example:



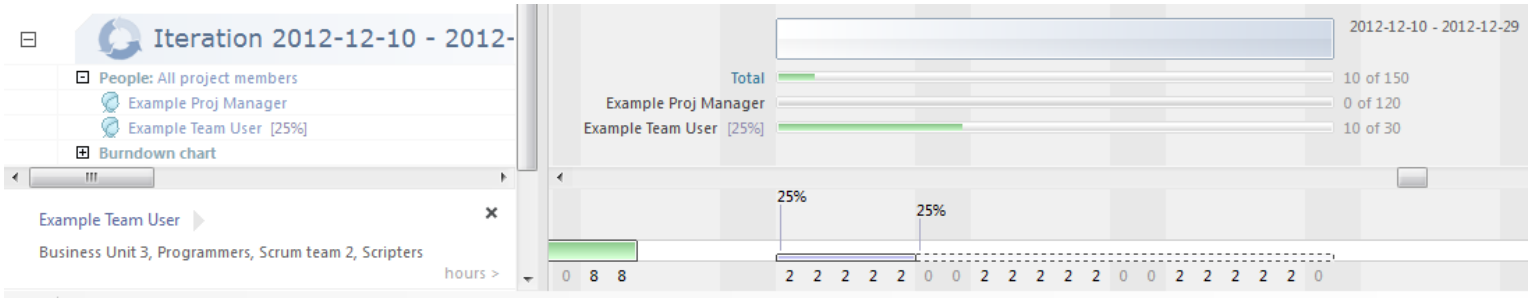
Here is an example of part time work for one user for three weeks. You can see how the out of office task is affecting the normal task by looking at the darker areas of the green task.



Another way to handle a part time working user in agile projects is to set the allocation percent for a user in a sprint:


People: Allocated to this Iteration
Example Proj Manager
Example Team User [25%]
Burndown chart
Iteration backlog items
Game code improvemer
Critters movement ar
Show work remaining for Example Team User
Set allocation percent for Example Team User in this Iteration
Allocate users to Iteration

"Example Team User" is now allocated to 25% in this sprint:



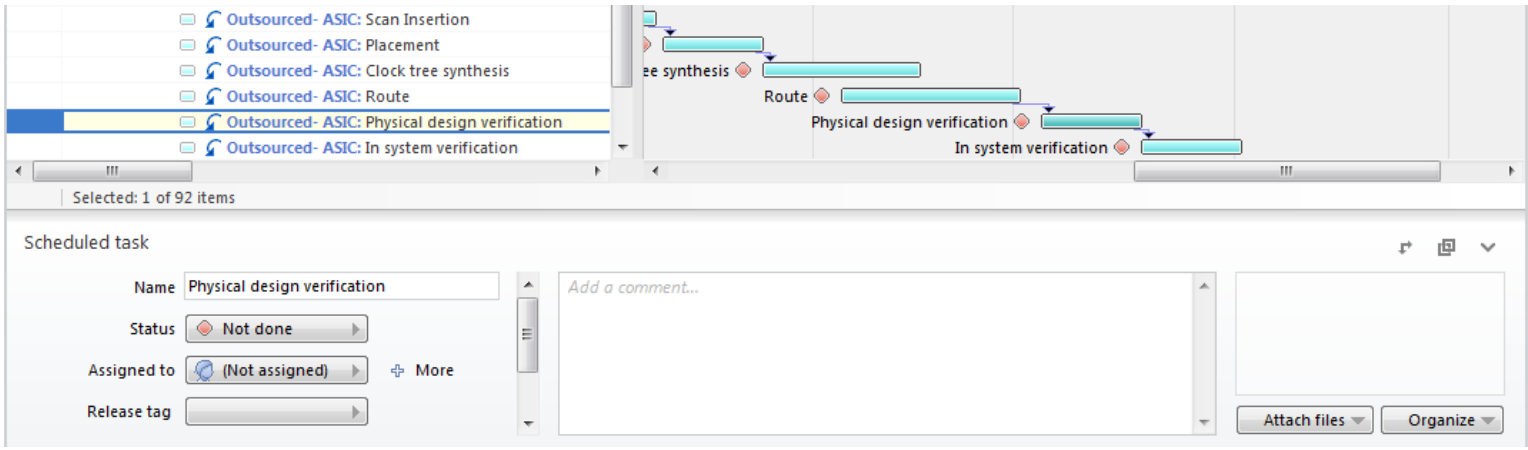
The activity details window

The activity details window is located below the activity list. It provides a quick and accessible way to edit the selected activities.

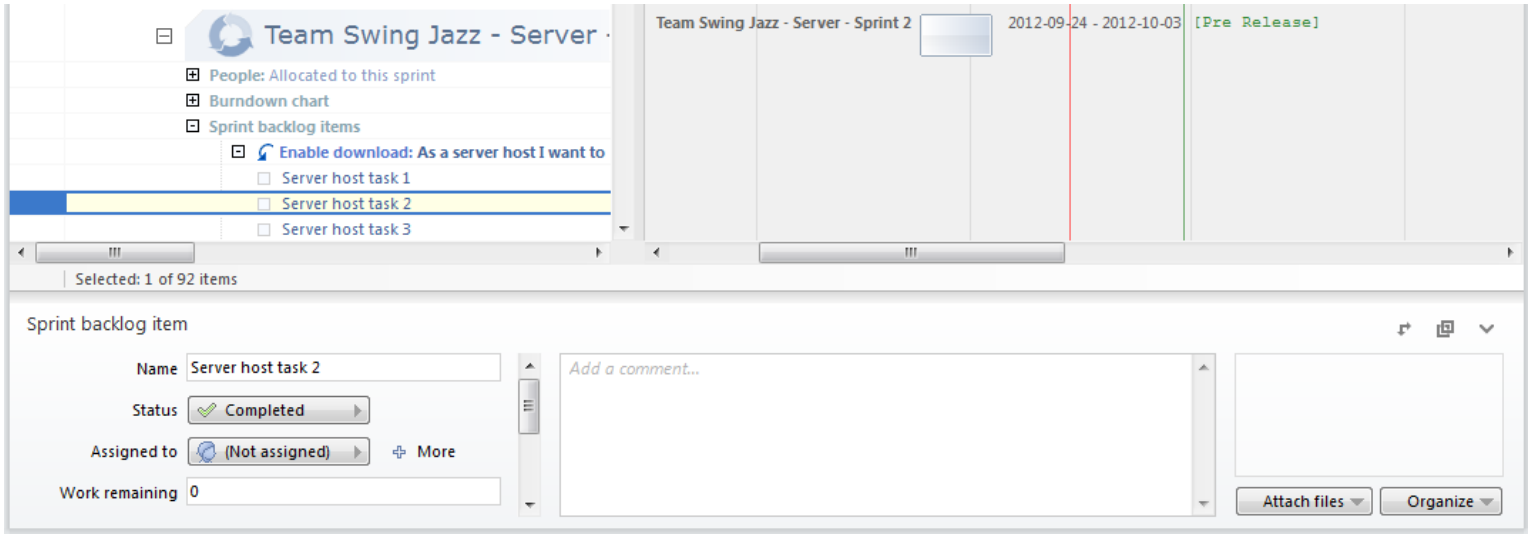
Please note that this window has a dynamic size and if you left click on the gray faded bar at the top of this window you can increase the size. As the size increases, more properties on the task/item will be visible. If the size is increased, as in the agile project example (see second picture in this chapter), you will see that you can directly manage attached files.

Also, please note that you can drag and drop files directly to this window.

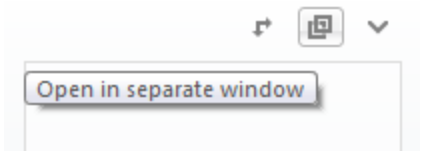
Activity details window in a task scheduling project:

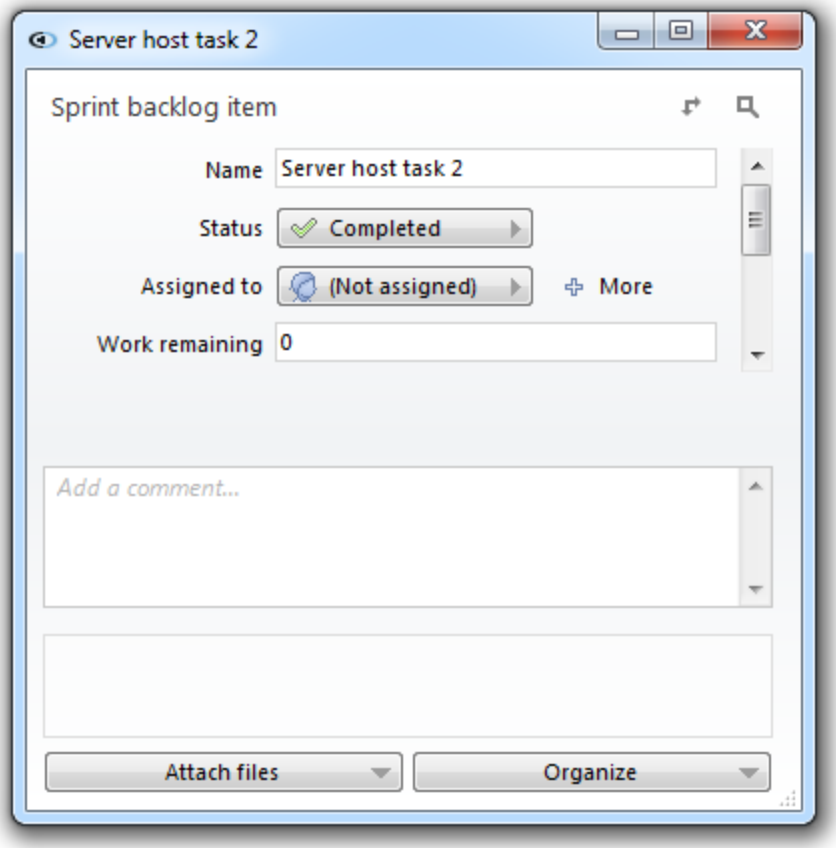


Activity details window in an agile project (with a sprint backlog item selected that has been flagged as a user story):



The activity details window can be opened in a separate window (click the detach icon). This allows people to work on multiple tasks at once:





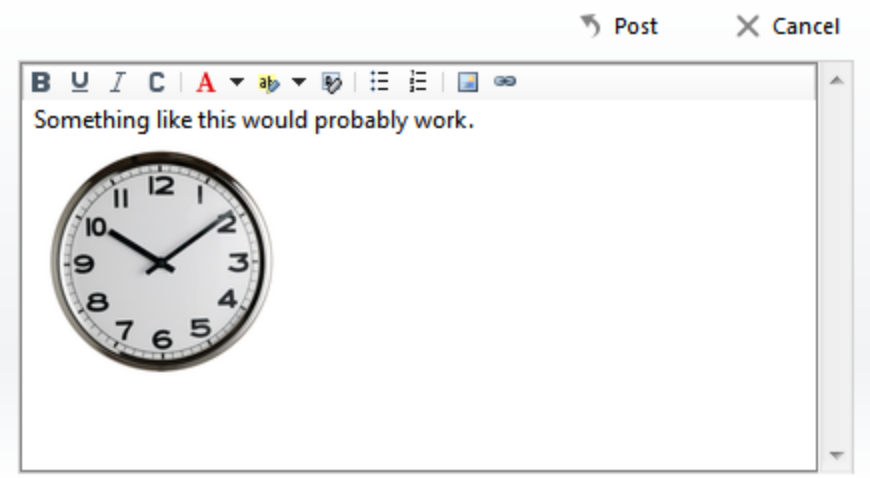
Comments: Post comment on an item/task. Please note that you can use html tags such as <bold> and </bold> or <URL=www.hansoft.se>Hansoft</URL>.

Hansoft features a "forum style" comments history and chat system with embedded images. As an example, you, project managers, executives or outsourcing partners can reply, post new and edit comments on tasks.

Comments with images

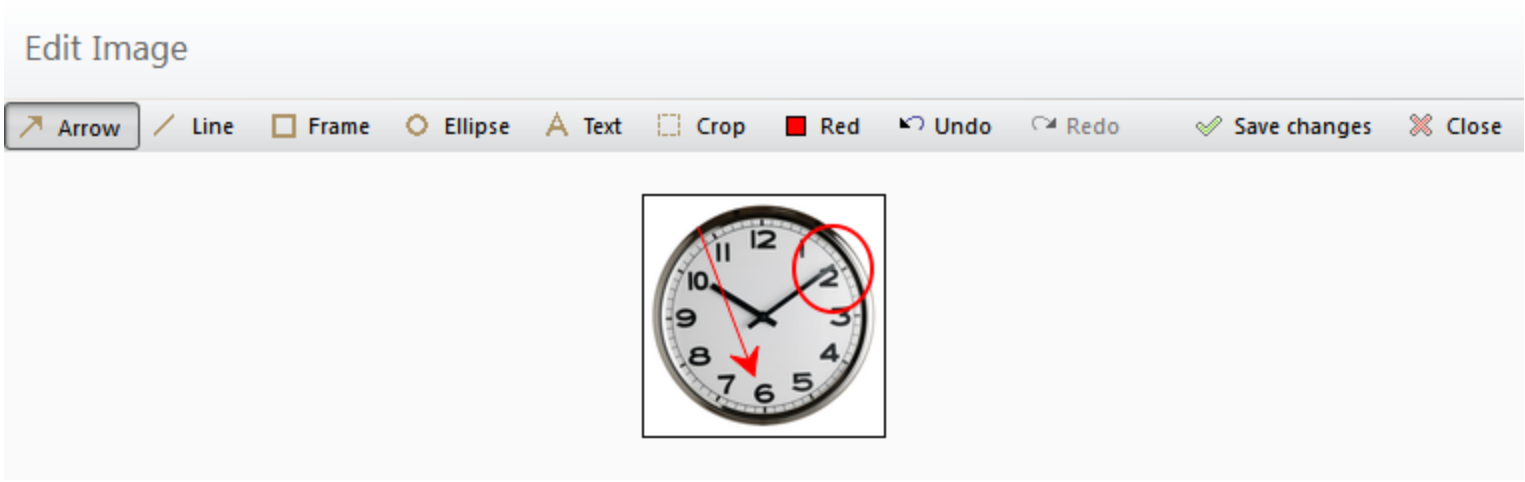
Hansoft features a comments system where you can embed and edit images. This useful when chatting about art assets, reporting bugs or discussing features.

Hansoft handles PNG, BMP, JPG and GIF files. Images can be inserted either by clicking the "Insert image" icon on the text field toolbar, or simply by pasting from the clipboard. You can also attach them from within Hansoft document system or by drag and drop from Windows.



An image recently pasted into a comments field

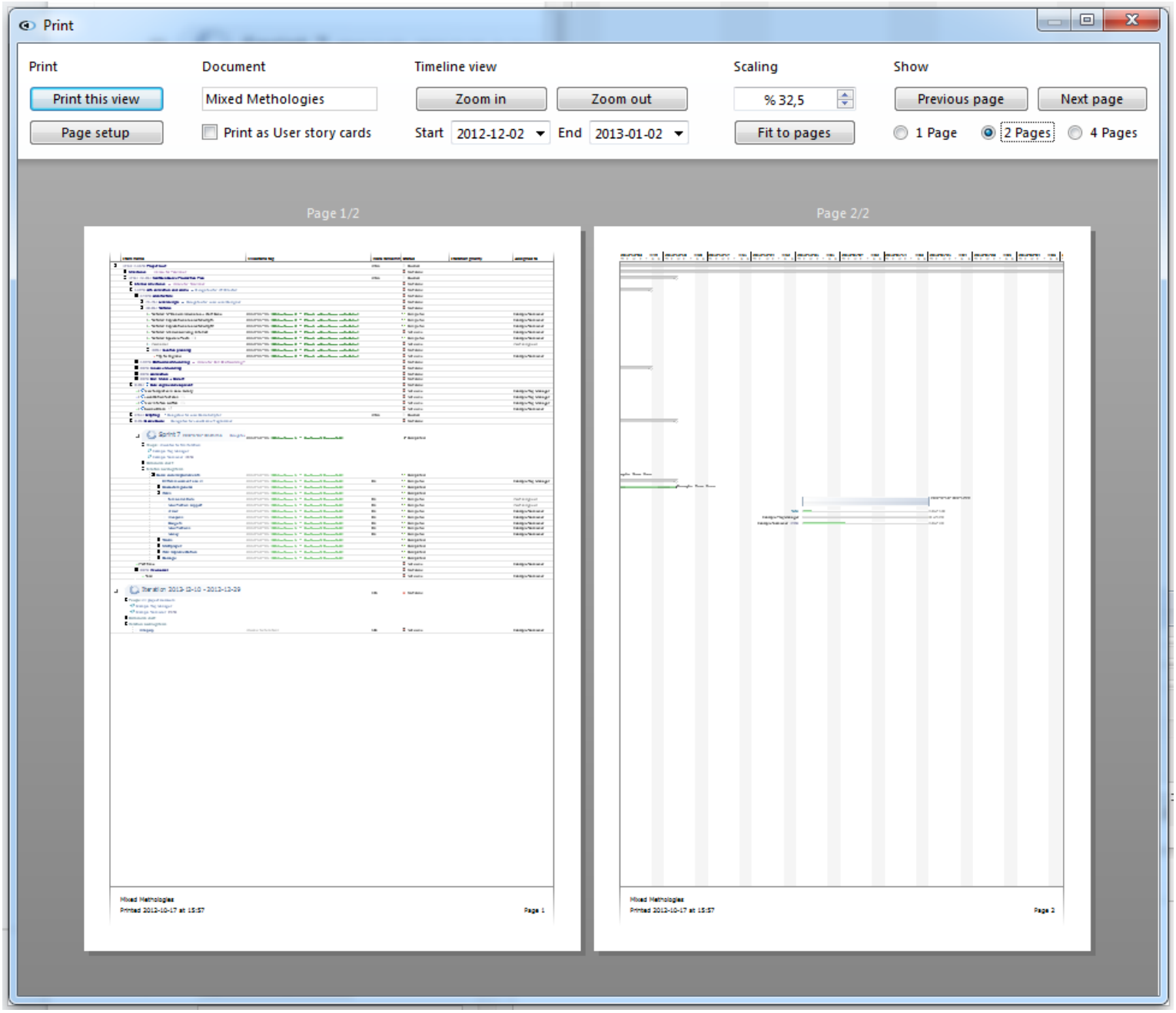
Hansoft also comes with an image editor, accessed by right-clicking the image and selecting **Edit image**. This is useful for highlighting or framing portions of an image relevant to the discussion.



The image editor

Printing and data importing/exporting

Click on Print (Ctrl + P, or Cmd + P) on the main main toolbar to bring up the Printing window.



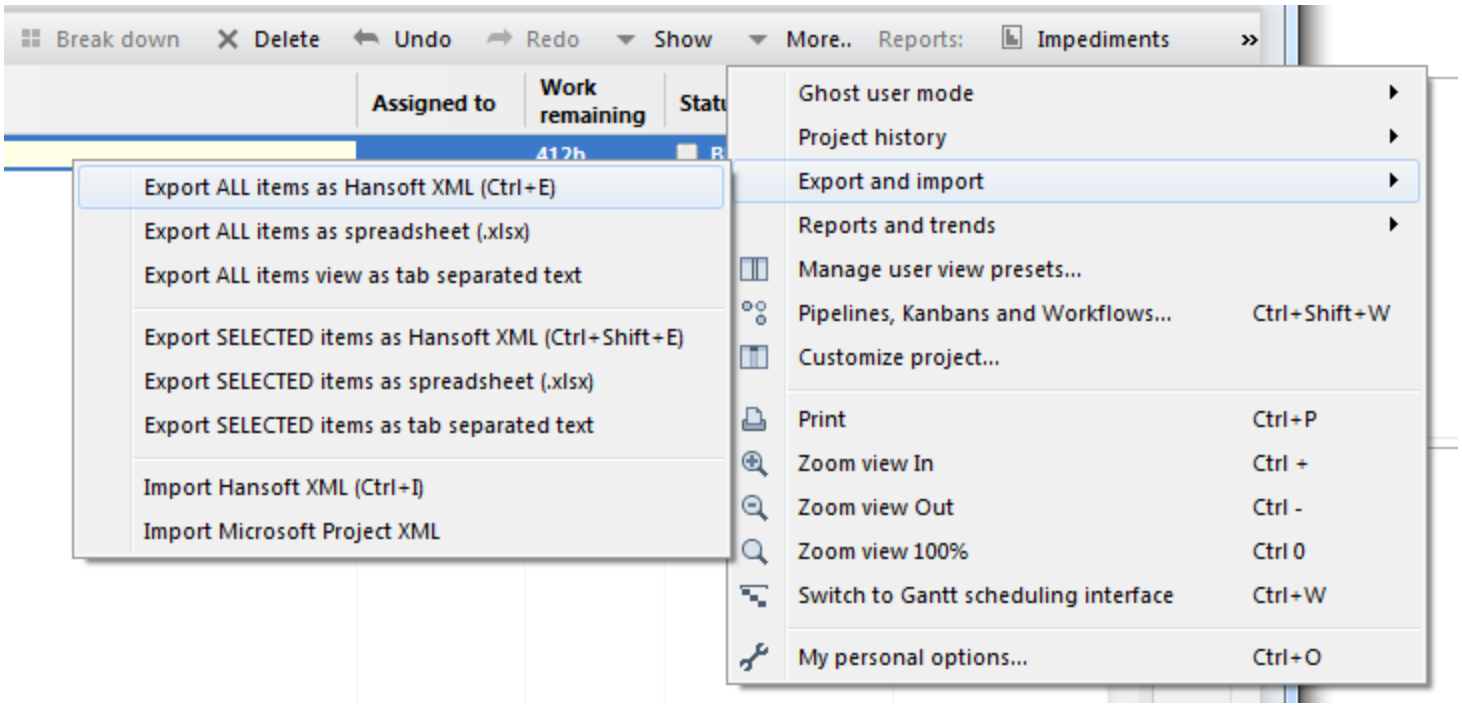
One easy way to change the way the document should be printed is to move the mouse over a column or the timeline view in the print preview. From there, you can grab it with your left mouse button and start dragging. With this action, you can change the column width or the timeline view start/end date.

Data importing/exporting (XML, spreadsheets or tab separated text)

All data in Hansoft Project Manager can be exported and imported as XML (eXtended Markup Language). This includes among other things users, projects, item lists and allocations. This can be very handy if you

want to use the project data that you have produced in another application. Many modern office programs and other applications support XML importing.

To export data press **Export this view as XML** in **More.. > Export** menu:



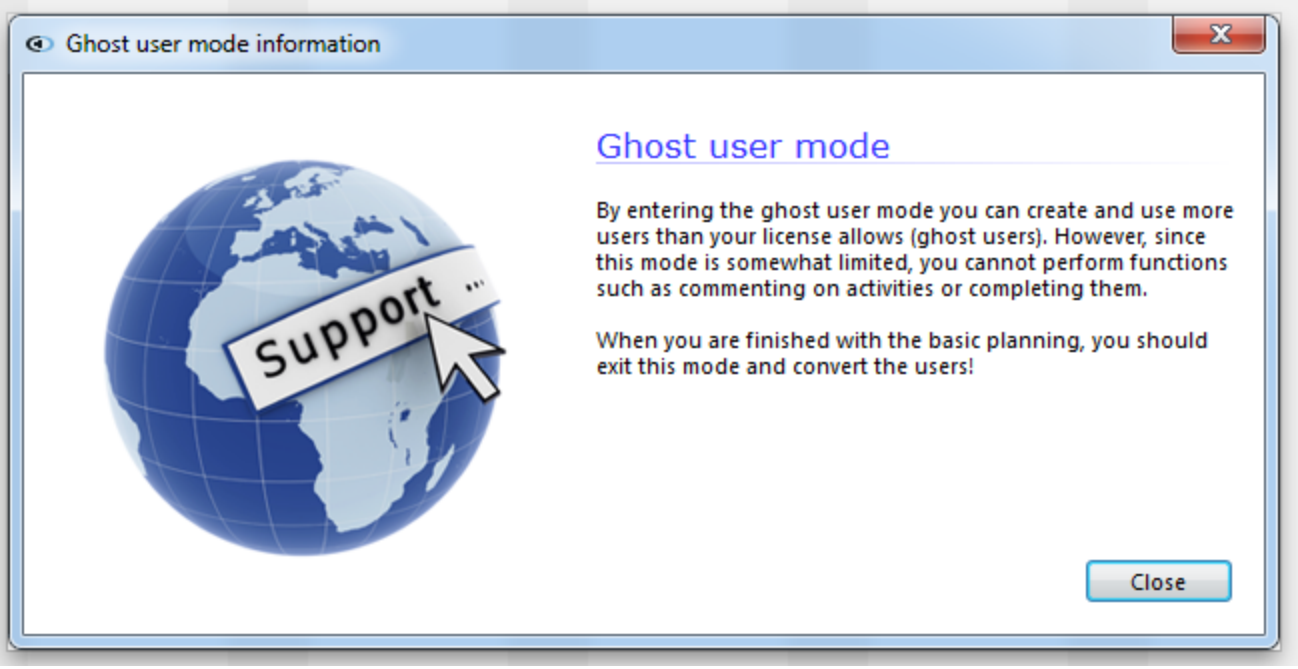
You can also export data in spreadsheet (.xls) format and as tab separated text.

You can import data in Hansoft XML format or in Microsoft Project (2003 or later) XML format. For a tutorial in how to import Microsoft Project 2003 XML click here.

Ghost user mode

By entering the ghost user mode you can create and use more users than your license allows (ghost users). This mode is somewhat limited. You cannot, for example, comment on items/activities or complete them. You create and delete ghost users by clicking on **Manage ghost users** on the main timeline toolbar. The ghost users you create cannot login to Hansoft with their client until they have been converted to normal users.

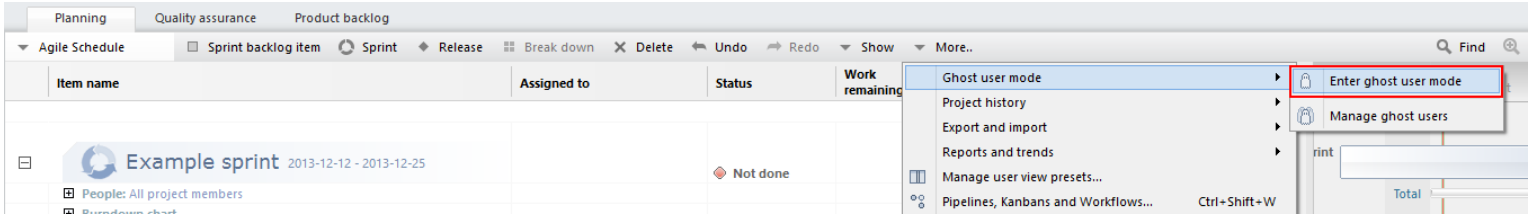
When you are finished with the basic planning, it is recommended that you exit this mode and convert the ghost users to normal users. If your license capacity does not allow for conversion of all ghost users to normal users, it is recommended that you upgrade your license either by using the upgrade license interface, or by contacting support@hansoft.se.


Ghost user mode information
Ghost user mode
By entering the ghost user mode you can create and use more users than your license allows (ghost users). However, since this mode is somewhat limited, you cannot perform functions such as commenting on activities or completing them.
When you are finished with the basic planning, you should exit this mode and convert the users!
Support
Close

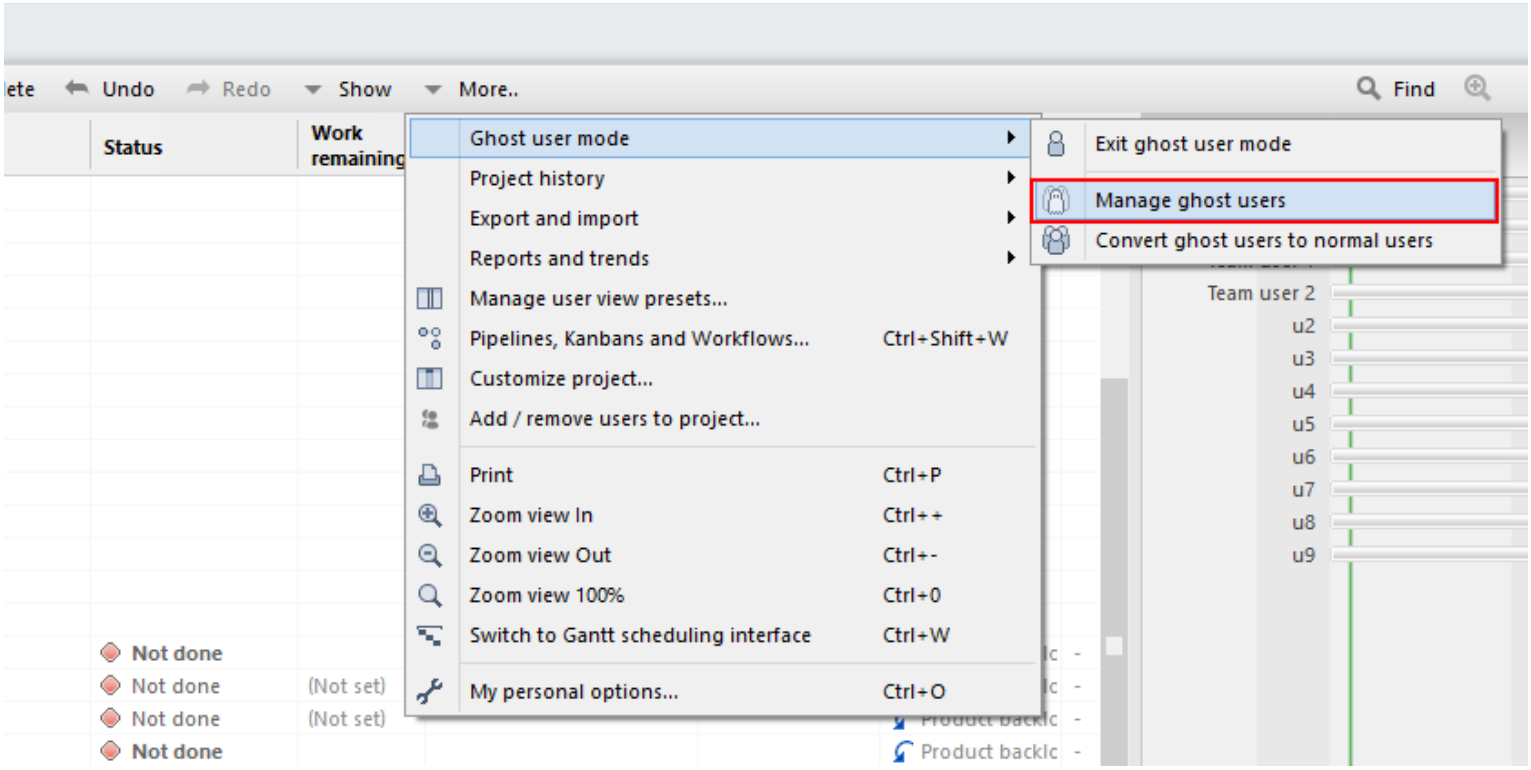
Creating a ghost user

Start by clicking **More..>Ghost user mode>Enter ghost user mode**

It is possible to create ghost users without entering **Ghost user mode**, however all ghost accounts will then be displayed as "Ghost user" instead of their respective names.



Access ghost account management options in **More..>Ghost user mode>Manage ghost users**

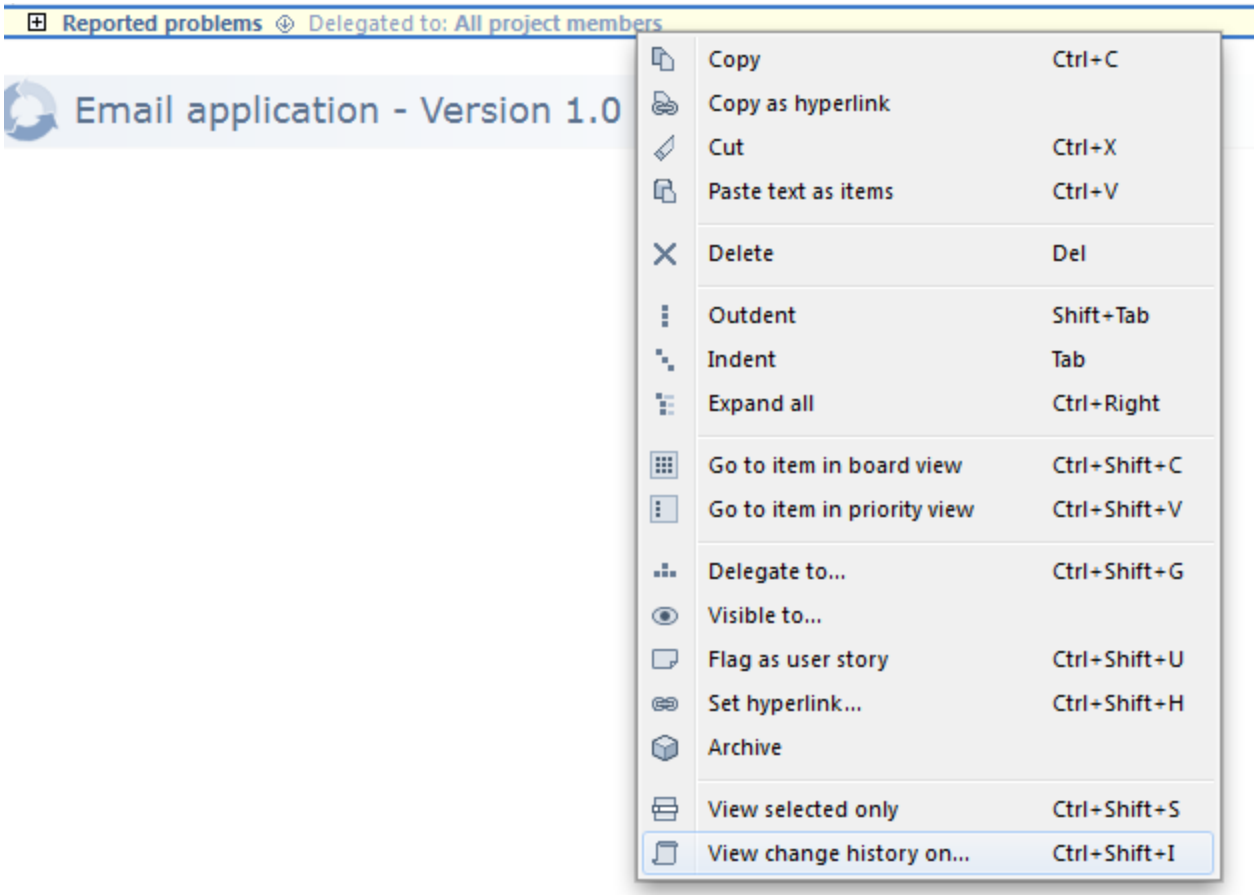


Detailed task/item history

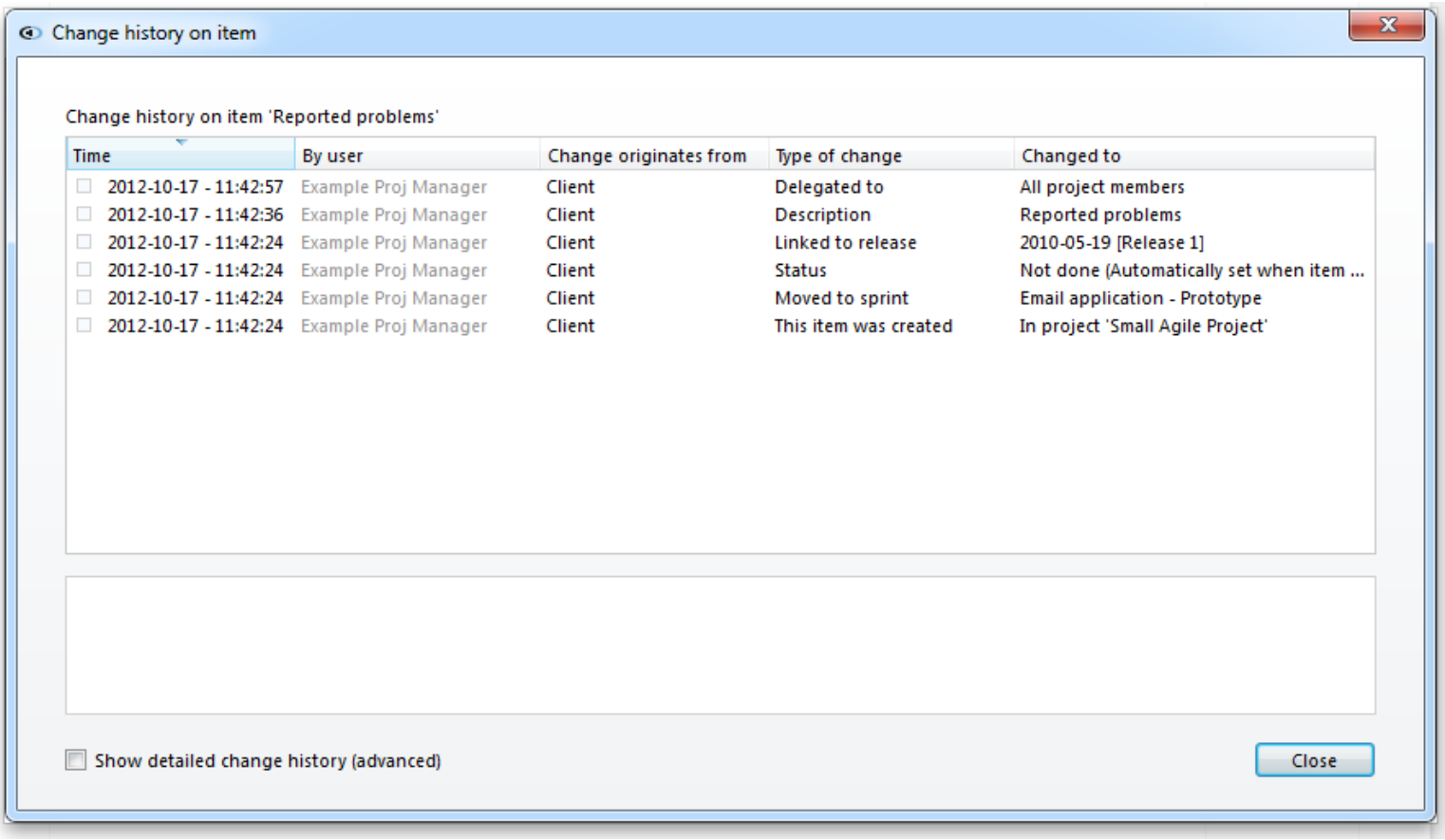
In order to analyze the actual workflow on a task/item you want to see the detailed change history.

Everything that happens to a task/item (or a bug) is stored on the Hansoft server and then retrieved on demand.

Right click and select **View change history on..** or press Ctrl + Shift + I (Cmd + Shift + I).



A detailed history will be presented:

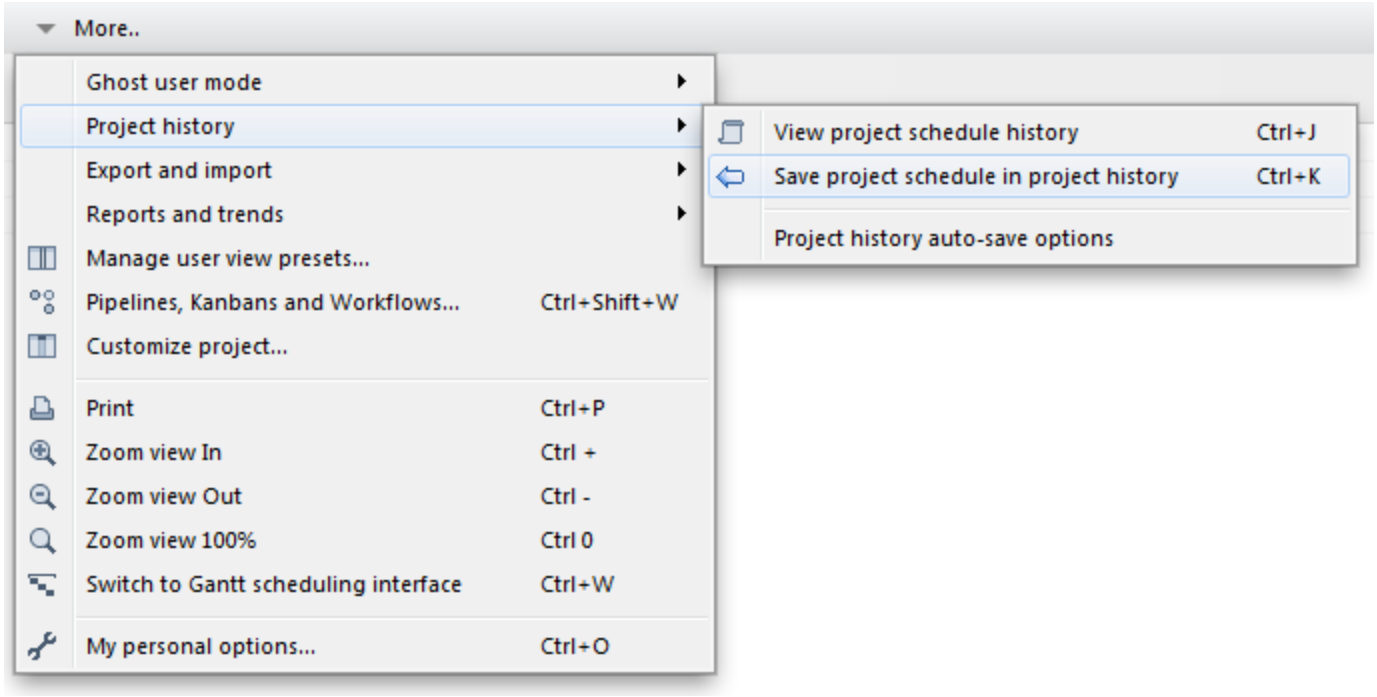


Project History

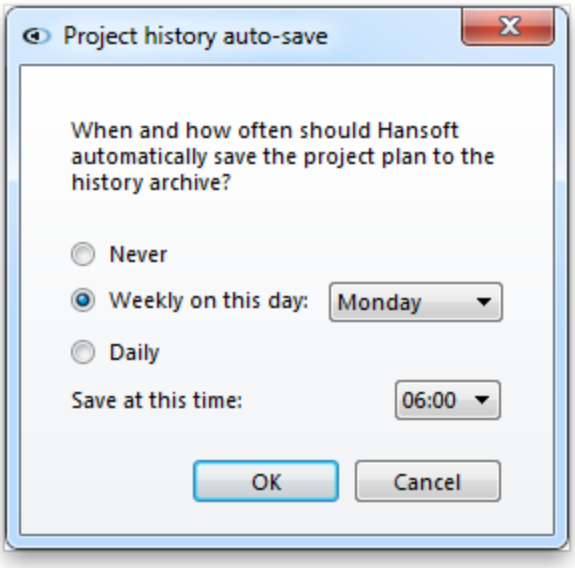
Save a perfect copy of the project in history and then compare it to the current one. Analyze slippage of releases, user groups (such as programmers), individuals, sub-projects or specific tasks.

Project history is accessed through the **More..** menu in the project. You can view project history, save the plan in project history and set auto-save options.

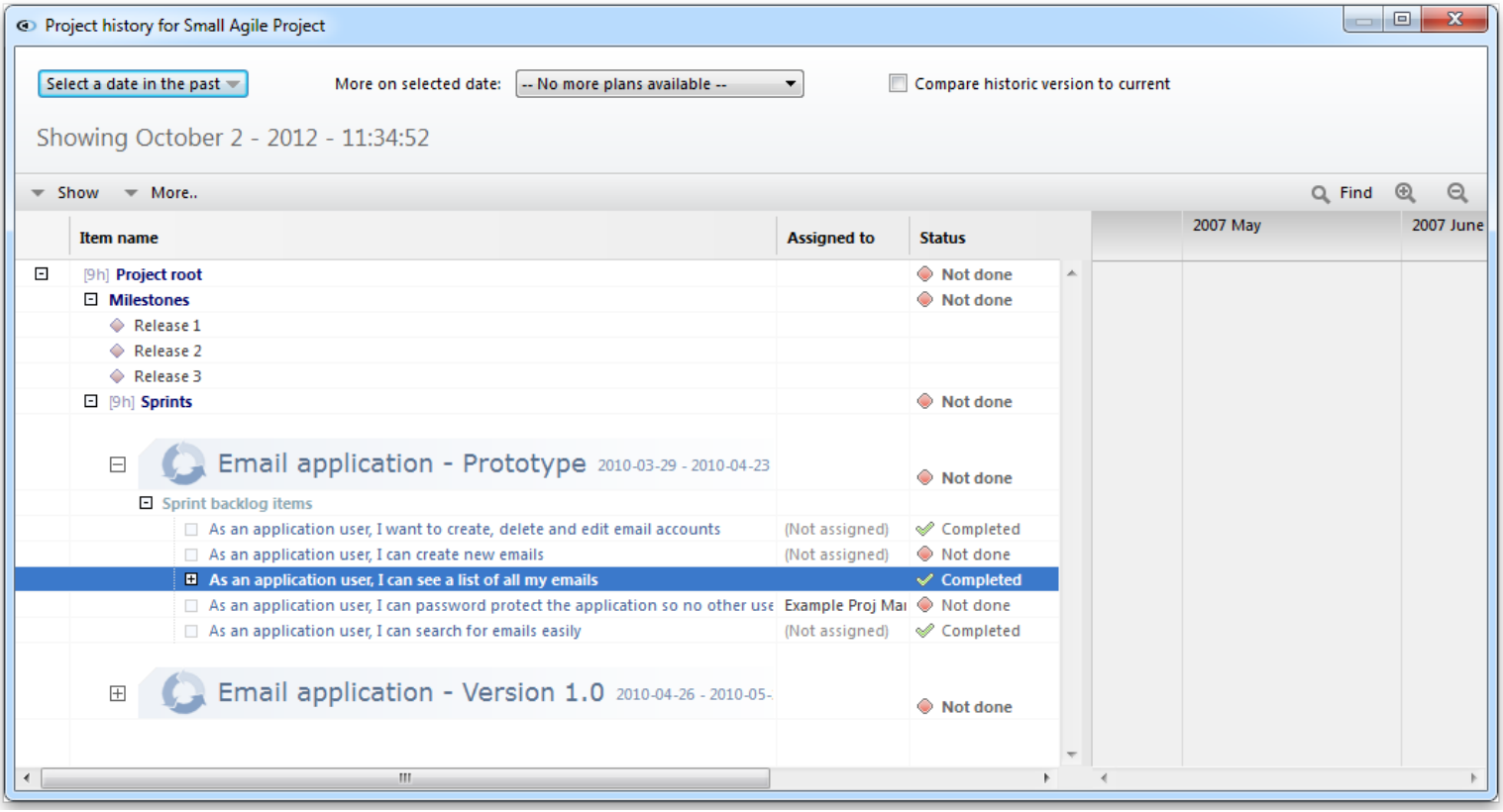
Tip: Before making a major change to the plan, save the current plan with Ctrl + K (Cmd + K). If not satisfied with your change, go to project history and roll back to the historic version.



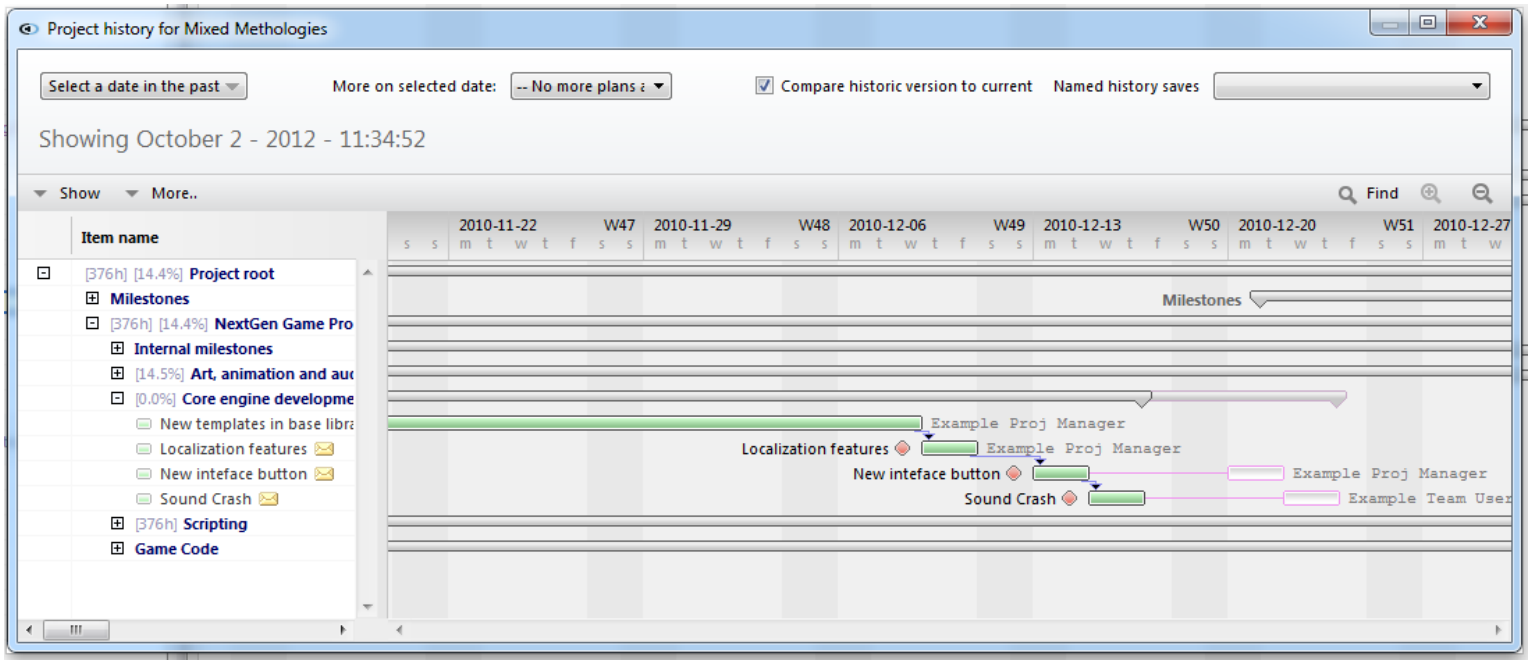
First, review the project history auto save-options. Automatically save project to the project history on a weekly or daily basis. Alternatively, you can turn auto-save off entirely.


Project history auto-save
When and how often should Hansoft automatically save the project plan to the history archive?
Never
Weekly on this day: Monday
Daily
Save at this time: 06:00
OK
Cancel

Press Ctrl + J (Cmd + J) or select from the menu to view project history. Displayed is the nearest saved history with respect to the current date and time. Browse project plans on previous dates in "Select a date in the past." If you have saved more project plans on a selected date, use the drop-down.

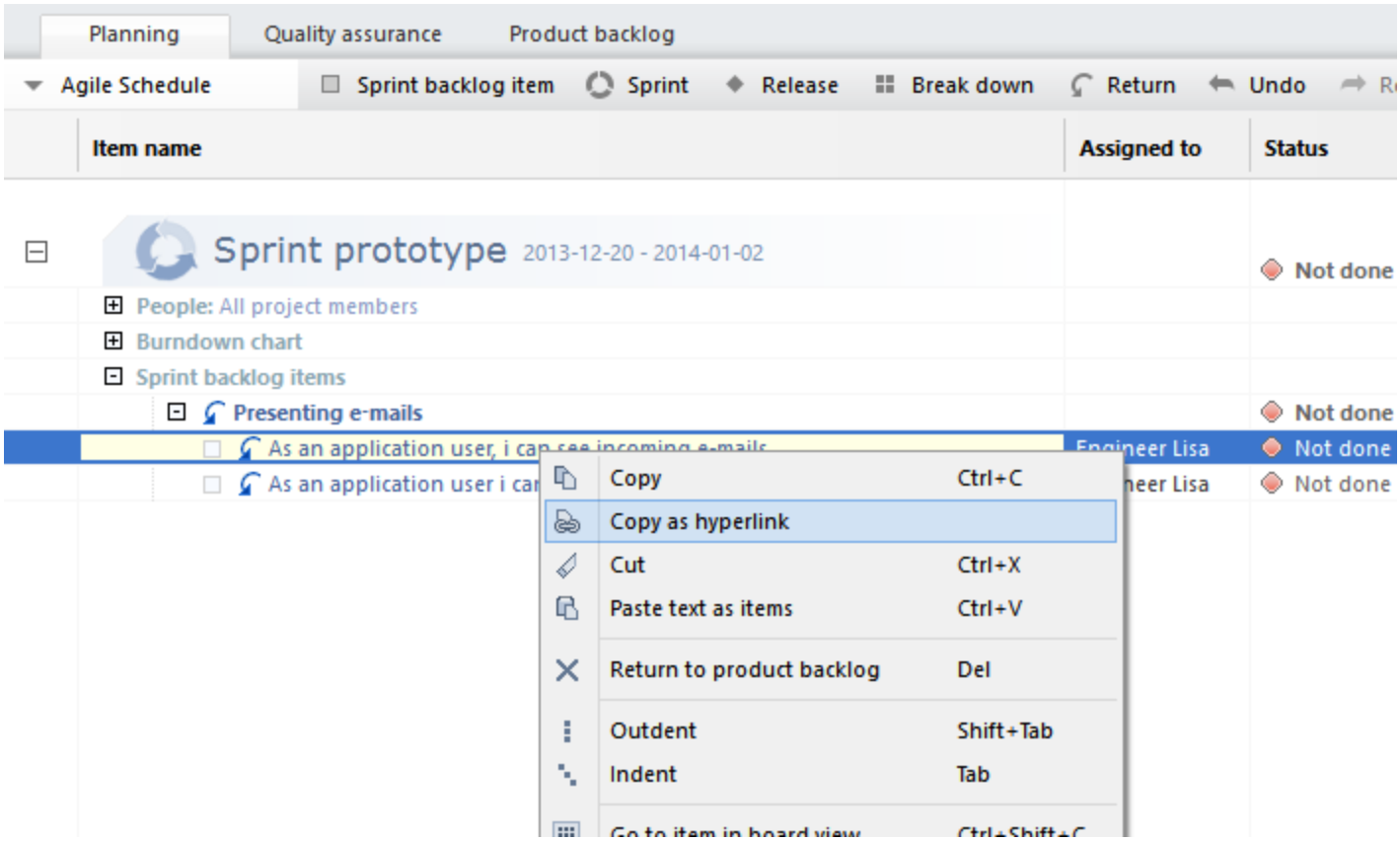


To compare current plan to a historic plan, click the checkbox. Violet colored text and visuals indicate change (often an indication of slippage). In the illustration below, we can observe heavy slippage by programmers (we have created a user group named "programmers" and assigned users to a couple of tasks).

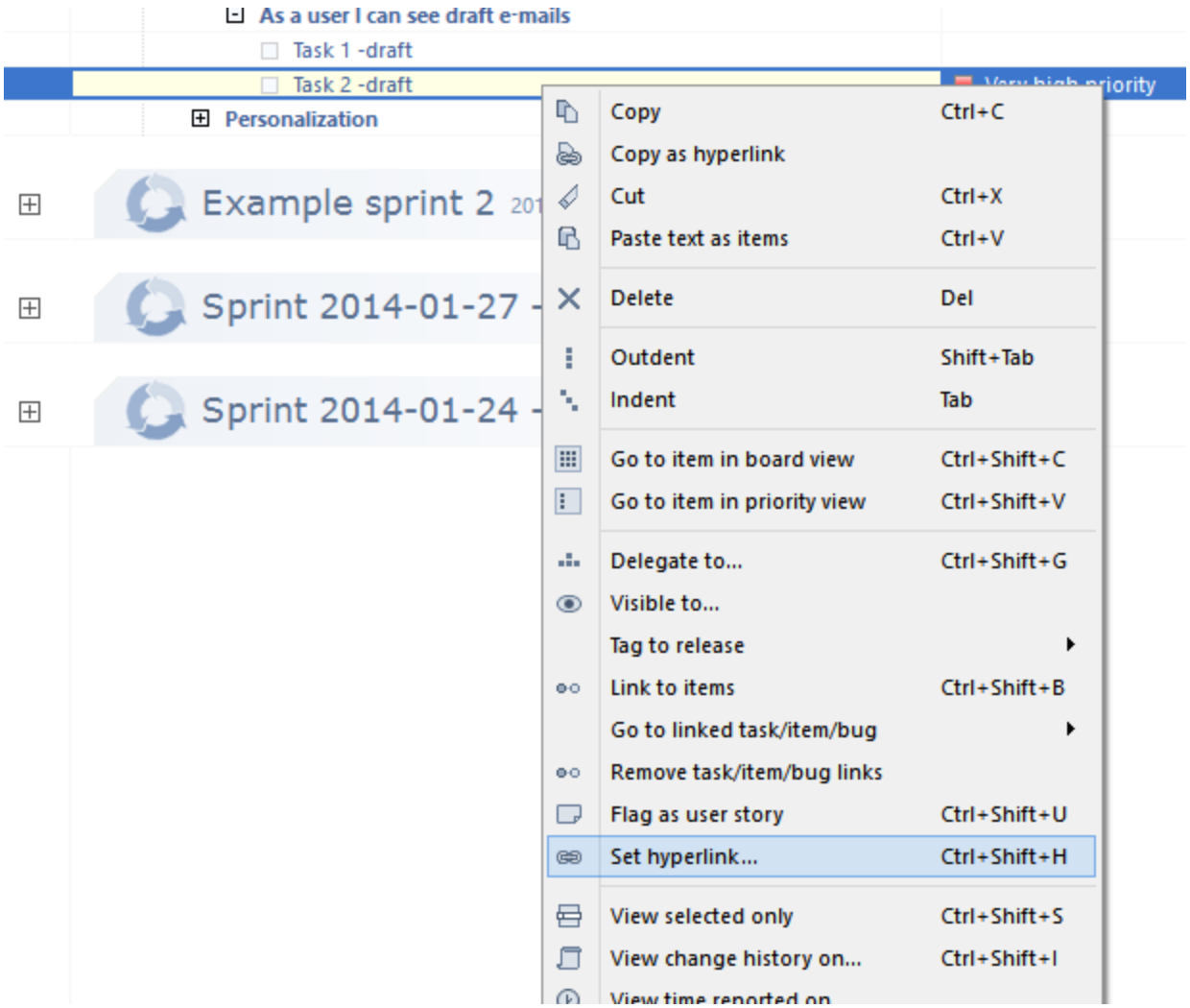


Hyperlink items

The hyperlink function in Hansoft can be very useful when referring to an item or document within the Hansoft client.



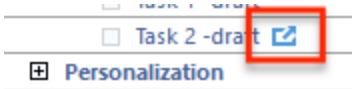
By right-clicking an item and choosing **Copy as hyperlink** a hyperlink to the selected item destination will be generated and added to your clipboard.



Set hyperlink... allows you to add a link address.

Note: This does not have to be a link pointing towards a Hansoft item.

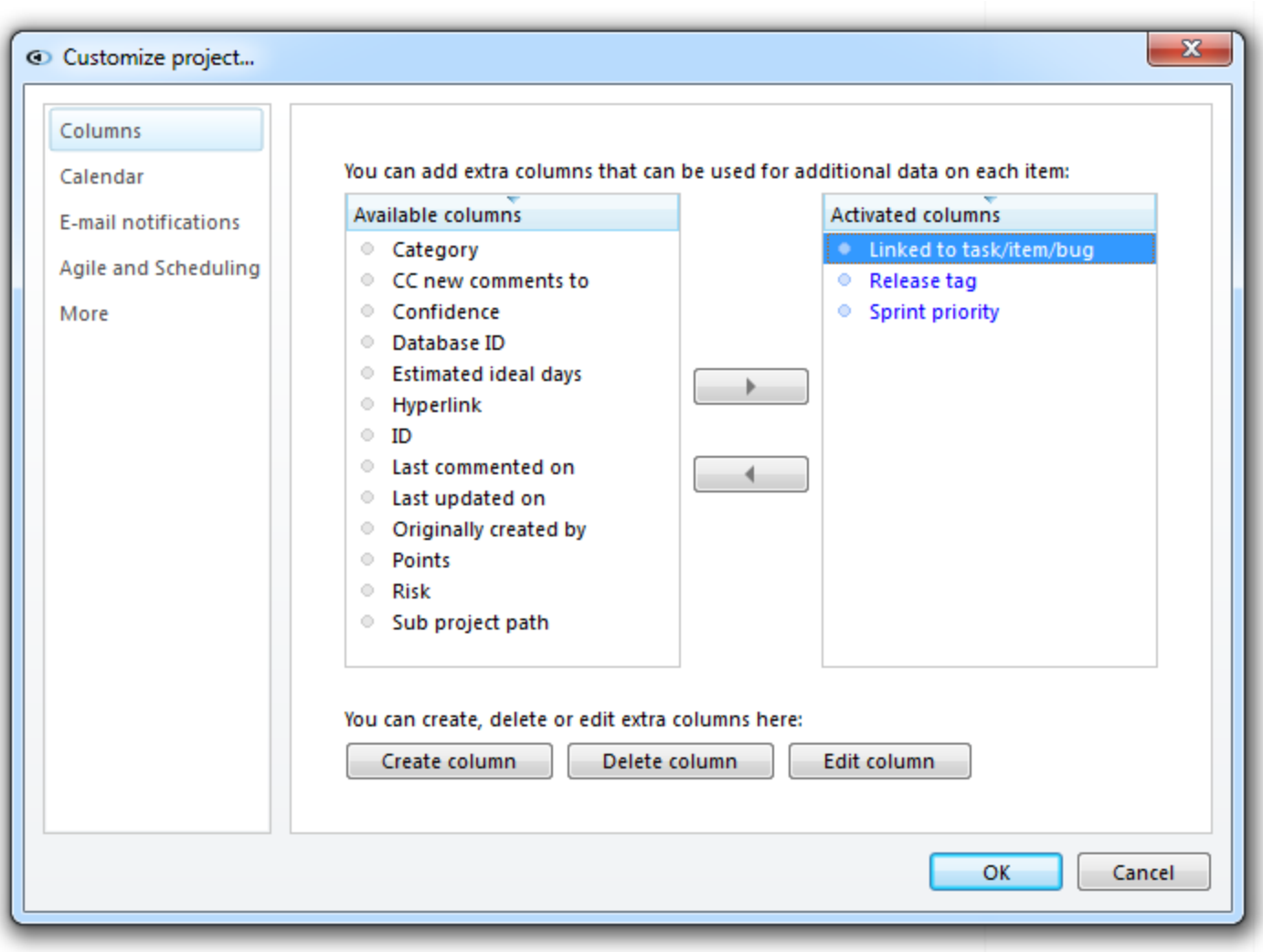
When an item has an attached hyperlink it receives a small click-able icon making it easily distinguishable from non-hyperlinked items.



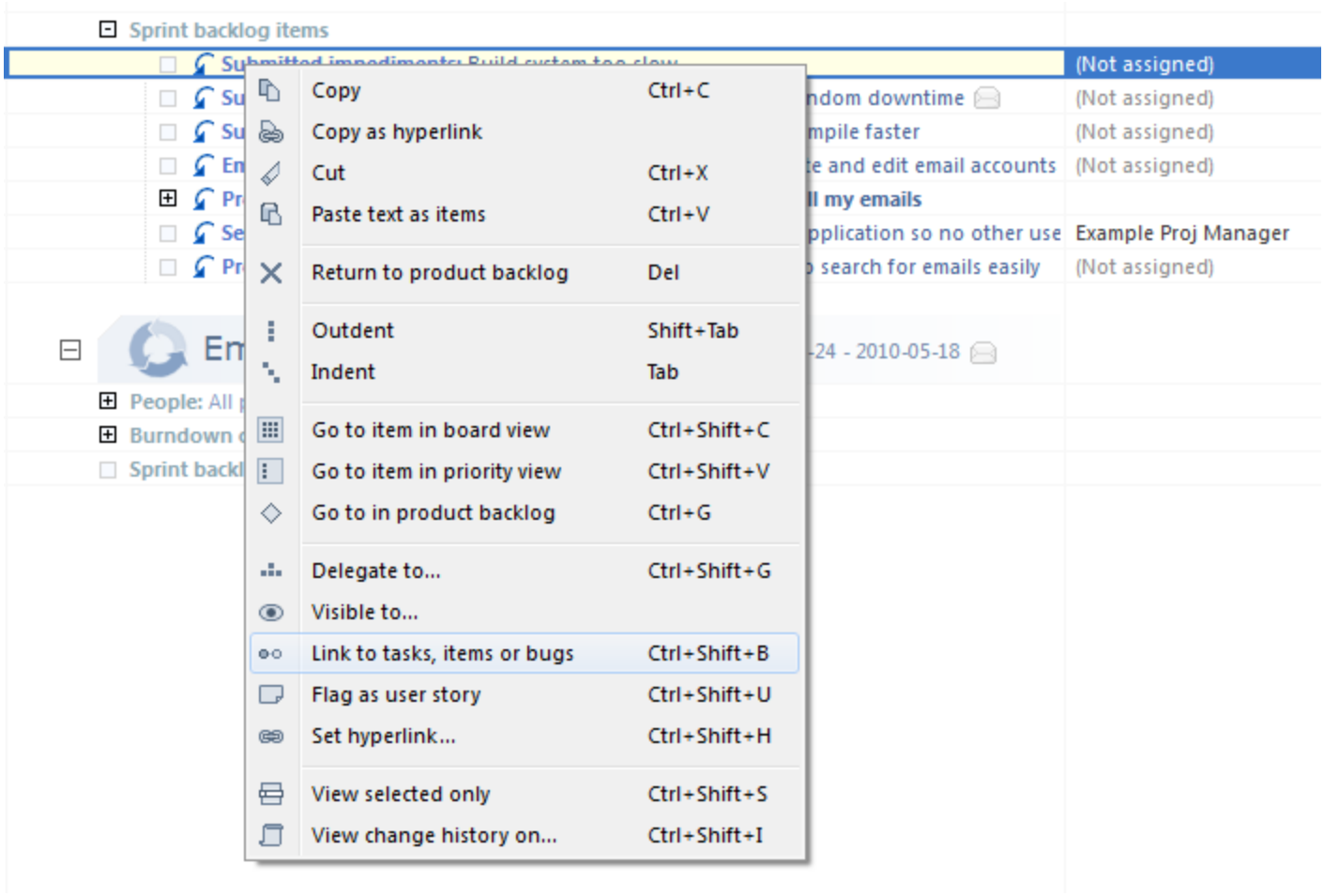
Connecting tasks/items/bugs

Hansoft offers functionality to link a task/item/bug to another task/item/bug. One of the most common scenarios is to link bugs to tasks and vice versa. This is useful, for example, when there are bugs related to a new feature in the product or in similar scenarios.

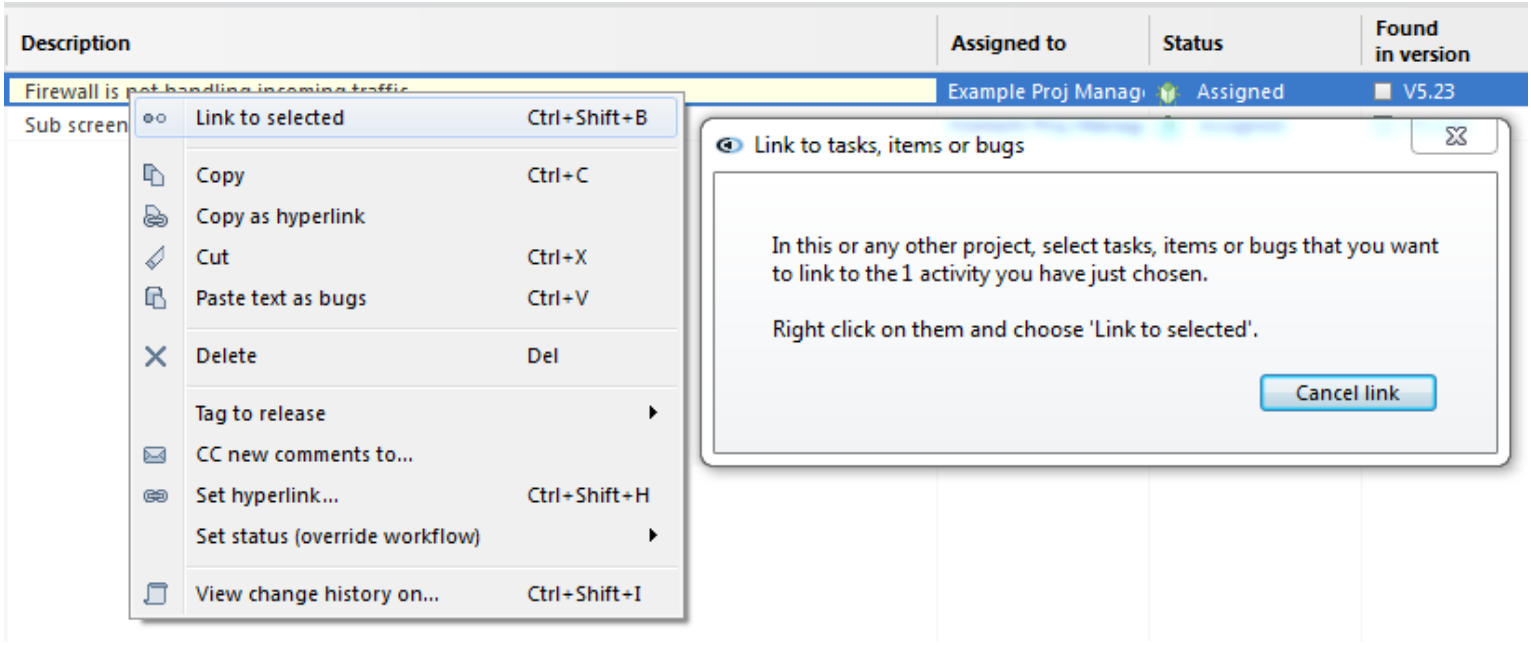
To activate this function, you must activate the extra column "Linked to task/item/bug" in Customize project (both in QA and in the planning view):



Go to the task or backlog item and select **Link to tasks, items or bugs**:



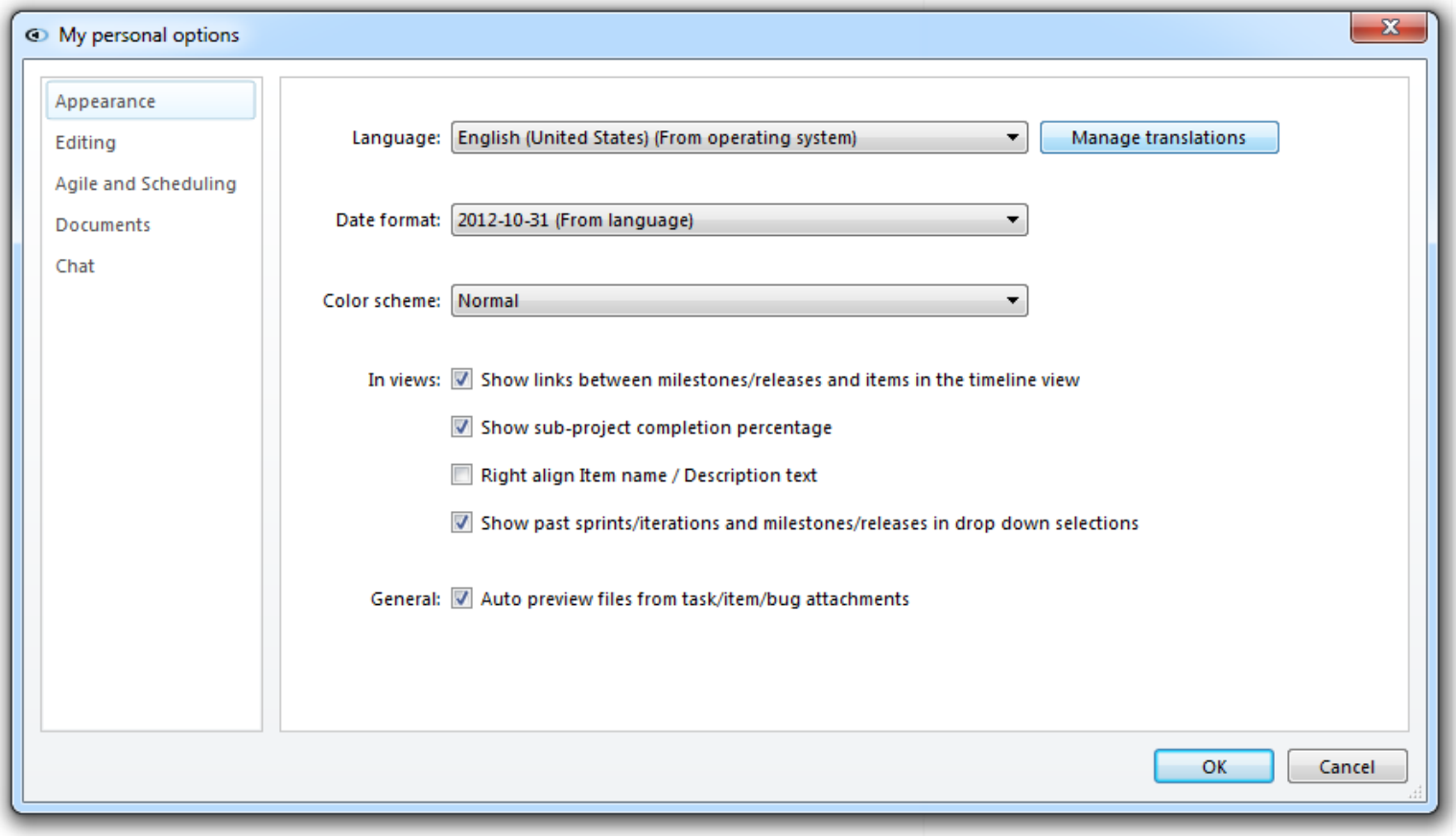
Now go to the QA view, right click and select **Link to selected**:


Description
Assigned to
Status
Found in version
Example Proj Manag
Assigned
V5.23
Link to selected Ctrl+Shift+B
Copy Ctrl+C
Copy as hyperlink
Cut Ctrl+X
Paste text as bugs Ctrl+V
Delete Del
Tag to release
CC new comments to...
Set hyperlink... Ctrl+Shift+H
Set status (override workflow)
View change history on... Ctrl+Shift+I
Link to tasks, items or bugs
In this or any other project, select tasks, items or bugs that you want to link to the 1 activity you have just chosen.
Right click on them and choose 'Link to selected'.
Cancel link

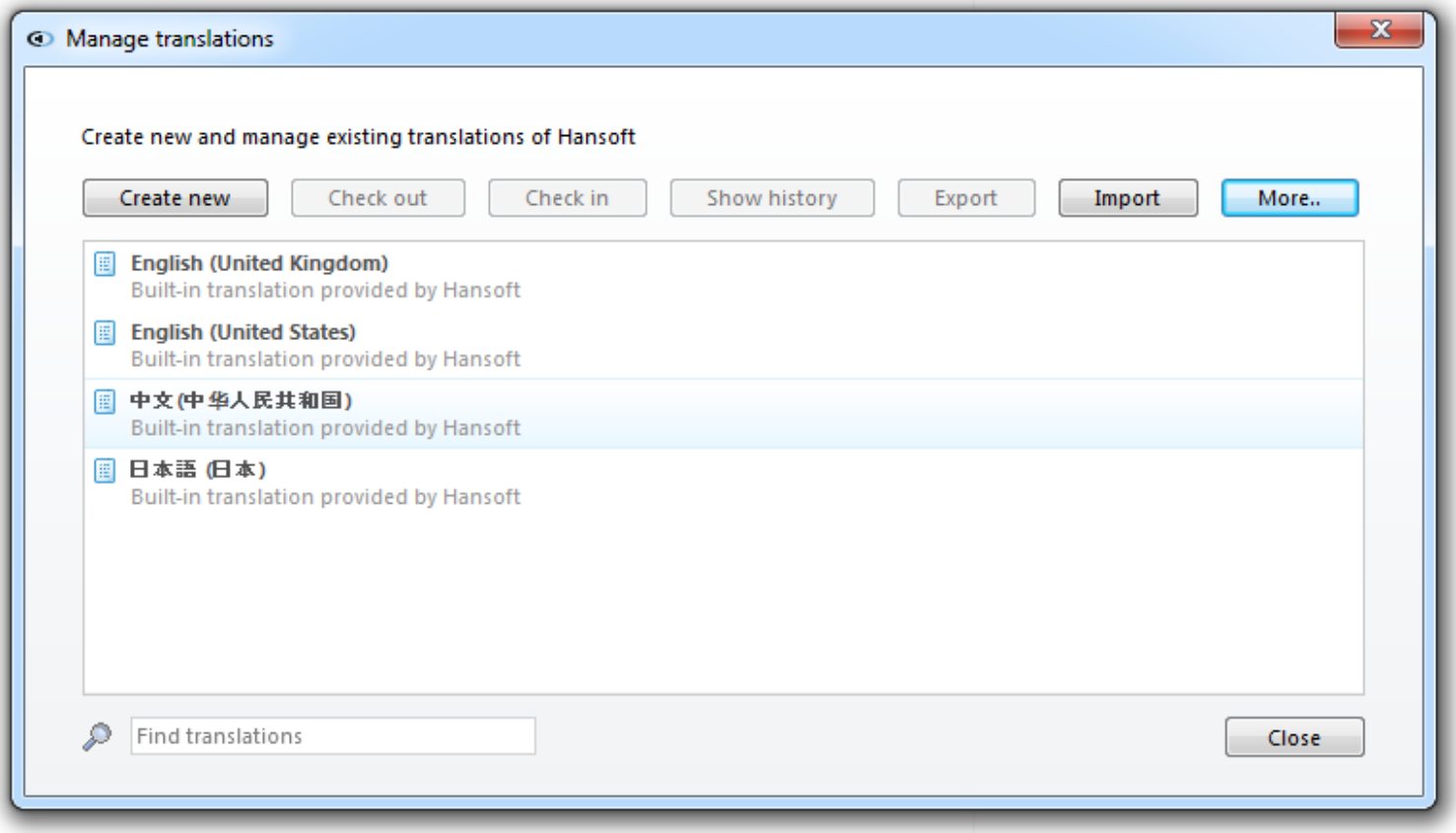
A link to the task/backlog item will now be visible in the column (it is cross-linked so a bug link is visible in the planning view):

Translations

You can open the Options window in Project schedule, Backlog, Quality assurance, Administration or in the To do list by clicking **More..>My personal options**(Shortcut: Ctrl + O (Cmd + O)). These options are personal but will affect all projects and views in the Hansoft client. For example if you change the language settings they will apply for all text in the entire client.



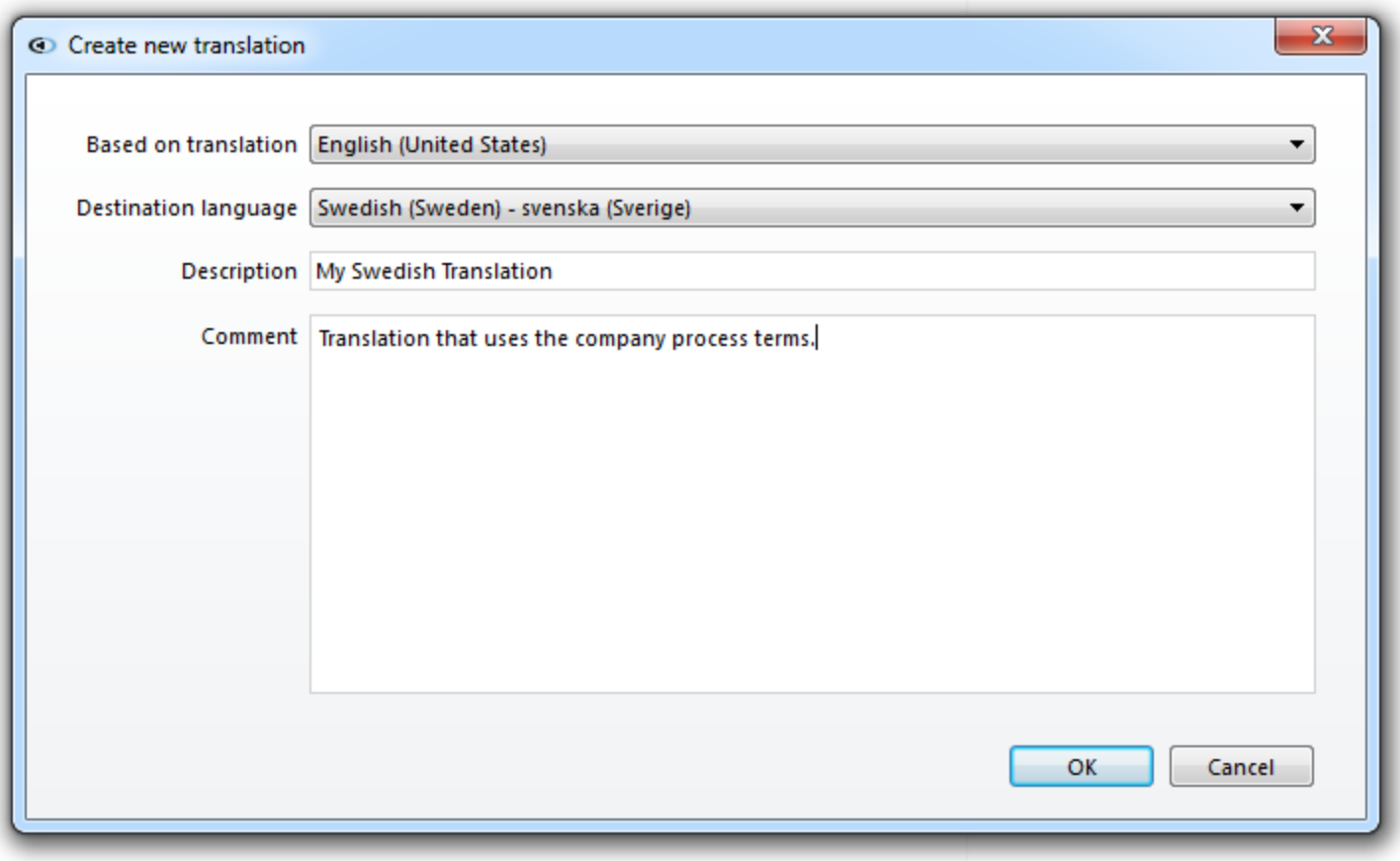
From Options you can open the "Manage translations" window. Here you can create new and edit your own translations.



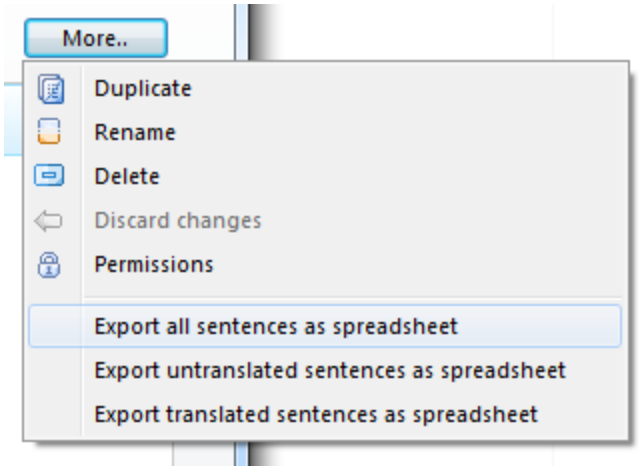
Create a new translation and select the destination language for what you are translating to. The "Based on translation" will set the language which the translation will use as a template.

For example:

Ponder that a translation does not cover every single label in Hansoft. This might be for several reasons, but probably because there is no appropriate translation due to differences in language structure. The translation will in this case retain the value of the base language.



The other options works similar to the document management in Hansoft. Check out, Check in and Show history provides you with the basic functionality for editing the translation files. Export is used when you want to export the translation you have done in a binary one-file format. In the **More..** menu you can duplicate, rename, delete and discard changes. You can also set permission on a translation on whom can edit them. If you want to analyze what you have translated you can export what you have translated and not translated to a spreadsheet file.



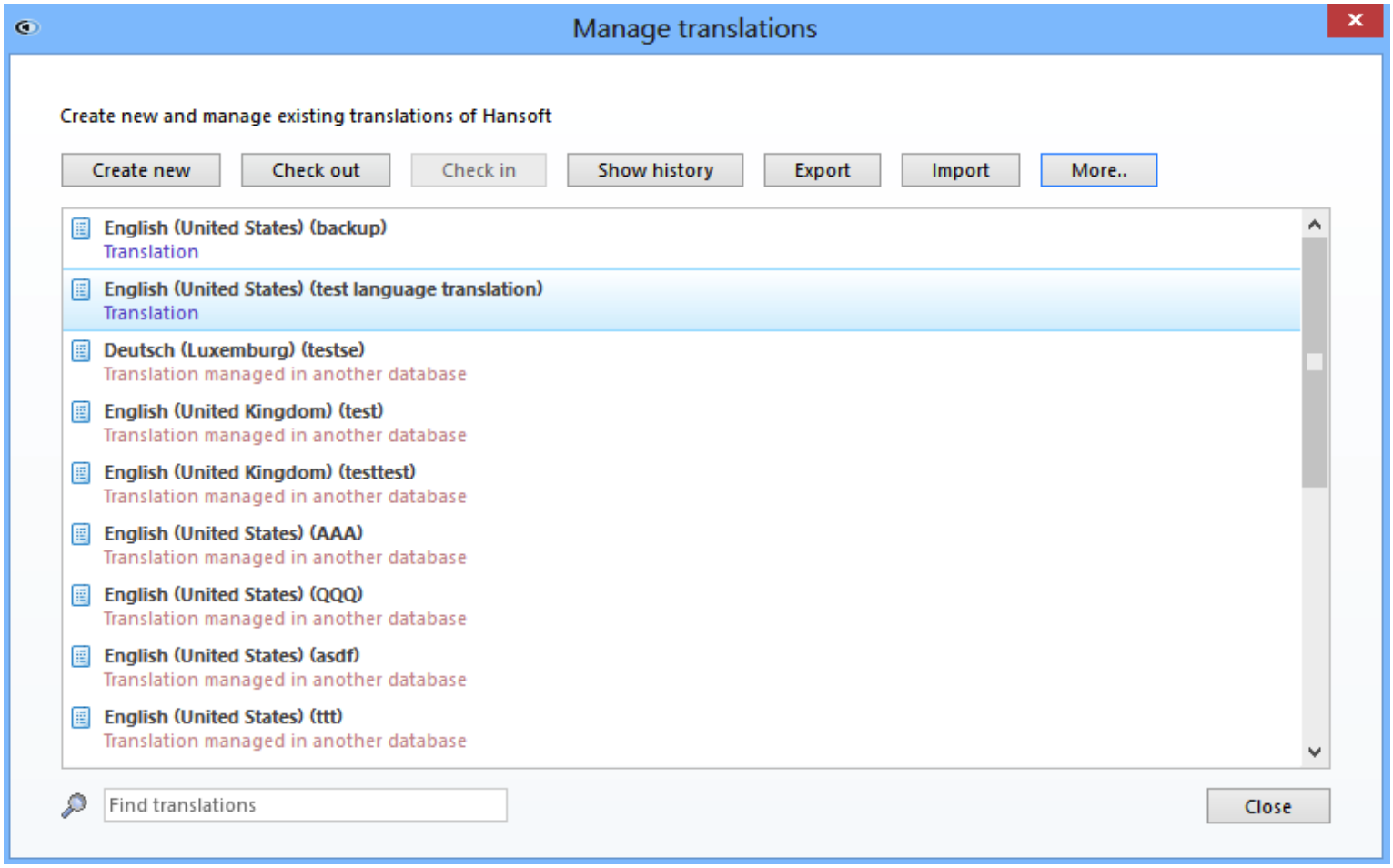
Changing specific labels

To change a label start by locating it in the correct IR file. This can be easily done by identifying the desired label's ID. In the personal options you can change language to "Debug IDs". Another way to find label IDs is to export a translation as an excel spreadsheet, which lists all of the Hansoft labels and their IDs.

More..>My personal options

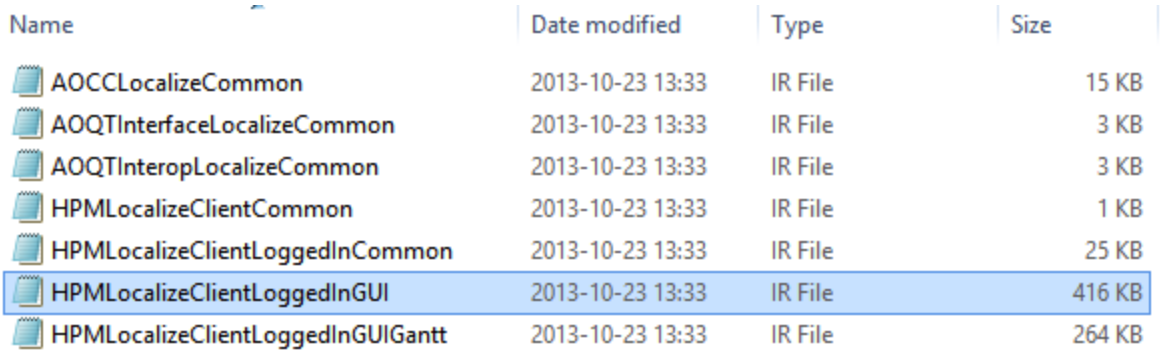
English

DebugIDs



Select the translation you wish to edit and check it out.

After you have checked out a translation you will be presented with a list of files containing every text string in Hansoft. The "HPMLocalizeClientLoggedInGui" contains the labels for the Hansoft client GUI.


Name
Date modified
Type
Size
AOCCLocalizeCommon 2013-10-23 13:33 IR File 15 KB
AOQTInterfaceLocalizeCommon 2013-10-23 13:33 IR File 3 KB
AOQTInteropLocalizeCommon 2013-10-23 13:33 IR File 3 KB
HPMLocalizeClientCommon 2013-10-23 13:33 IR File 1 KB
HPMLocalizeClientLoggedInCommon 2013-10-23 13:33 IR File 25 KB
HPMLocalizeClientLoggedInGUI 2013-10-23 13:33 IR File 416 KB
HPMLocalizeClientLoggedInGUIGantt 2013-10-23 13:33 IR File 264 KB

Open a search box(Ctrl+f/Cmd+f) and input the label ID.

To change a label simply type in your desired replacement between the quotation marks next to the default label.

Note that in this example we will be attempting to replace the label "Planning"

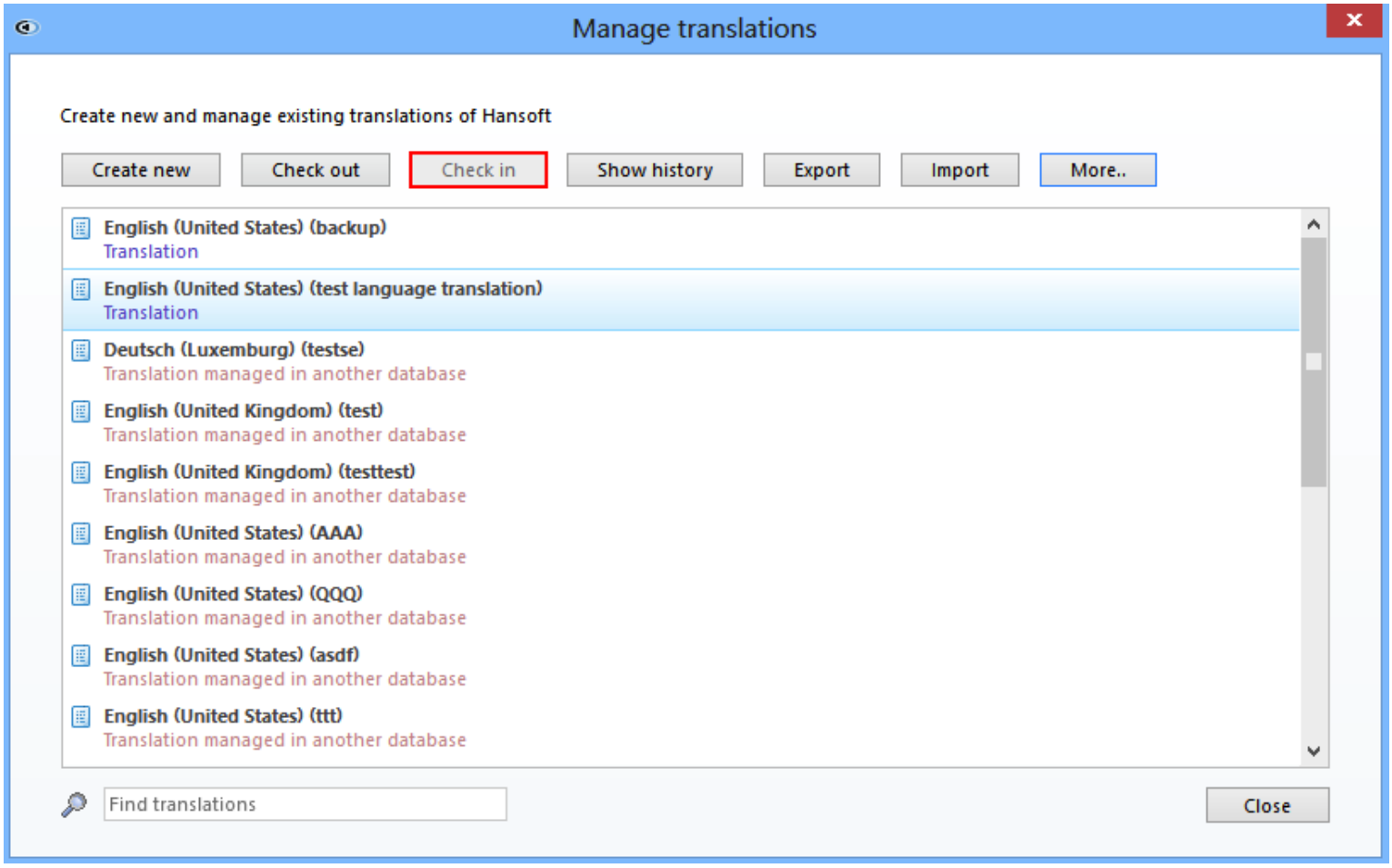
```
Planning "EXAMPLE REPLACEMENT"

{

// 30f682ee

:00_Current "Planning"

}
```



After the desired changes have been completed, return to "Manage translations" and check in.

Pipelines, kanbans and workflows

Introduction

Overview

Pipelines, kanbans, and workflows are related concepts in that they allow you to define the process that an item of some kind should follow. In fact, Pipelines and kanbans have exactly the same representation in Hansoft and the difference is more a mental one. A way to think about these different concepts is in terms of the situations in which they are useful.

• Pipeline - A pipeline can be thought of as a template that creates a series of detailed tasks when the pipeline is applied to an item in the Planning view. For example, if you have a special kind of backlog item that always go through the same sequence of tasks when they are committed into the Planning view in Hansoft you can create a Pipeline that defines this task sequence. You can then assign the defined pipeline to these items in the Product backlog and then whenever they are committed to the Planning view the pipeline will be instantiated as a set of subtasks to the committed item. Pipelines are typically used to automate task creation in a sprint on a fairly detailed level. The steps in a pipeline typically maps to tasks that should be performed by an individual person. Even though it is possible to visualize a pipeline in the board view in Hansoft they are often too detailed and have too much branching/parallelism in them for this to be manageable. For the most part pipeline items will be interacted with from the Hierarchical Planning view and each user's To do list.

• Kanban - A kanban in Hansoft, or more precisely a kanban board or kanban flow, can be seen as a way to visualize a value flow. The value flow comprises a set of items flowing through a number of refinement steps. Typically the steps of the kanban are related to different stages of refinement for the items that are flowing through the kanban. Kanbans are useful on different levels of abstraction, they can be used to visualize high level value flow for Features or Business Epics but they are also useful on the team level, for example for teams that utilize a kanban or scrumban approach. When used on a team level a kanban can define a series of high level steps, for example Define-Build-Test. Each such step can then be defined in more detail in the schedule view by breaking it down into subtasks that an individual can work on. Kanbans are typically created because you want to visualize the value flow of items; hence the board view is typically used to visualize that. Another strength kanbans is that you can use concepts like maximum work in progress limits and takt time to manage and improve the cycle time in your value flow. Kanbans are mostly useful when you don't have too many steps or a lot of parallelism in the flow.

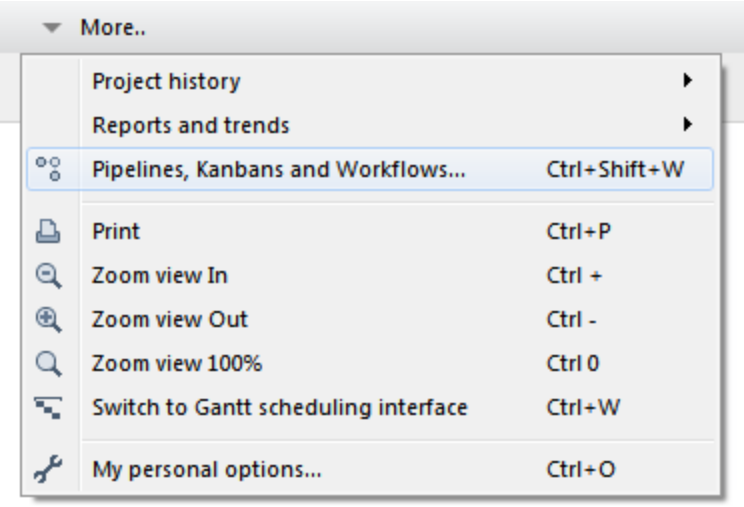
• Workflow - While pipelines and kanbans focuses on the end to end flow for items through a series of stages or tasks, workflows are focused on how an item can go through a series of status changes through its life time. In fact, a workflow is a kind of a finite state machine. We have already seen that a workflow is automatically attached to bugs created in the Quality assurance section of Hansoft. It is, however, also possible to attach a workflow to an item in the schedule. A common reason for attaching a workflow to an item in the schedule is that you have some kind of sign-off process that items should go through before they can be considered fully completed. Typical examples includes a sign off process for art assets when

developing a video game or a sign off process for user stories/product backlog items that are worked on in a sprint.

Functionality in Hansoft

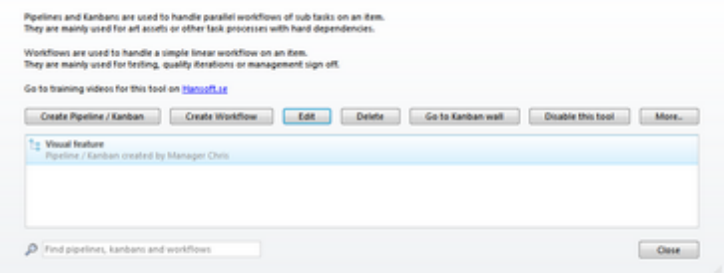
Pipelines and workflows are used to describe the order in which tasks are performed. It is useful for facilitating hand-offs, sign-offs, or simply to embrace the iterative nature of many development environments. Pipelines, which are also used in Kanban planning, define a "tree" of tasks, which can be executed in parallel or in sequence, while workflows define the possible states a task can be in.

The pipelines, kanbans and workflows tool is accessed in the **More..** menu, or by pressing Ctrl + Shift + W in the schedule or backlog views (Cmd + Shift + W). Workflows are also available for Quality Assurance items.



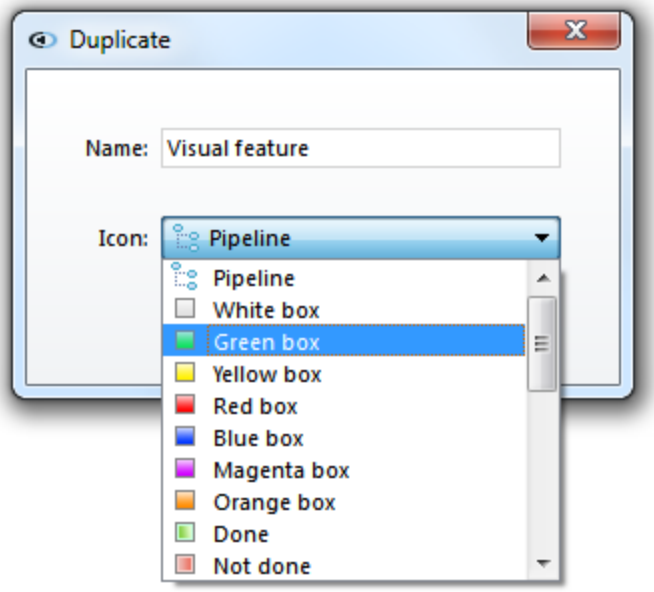
Entering the Pipeline, kanban and workflow tool from the **More..** menu

Before pipelines and workflows can be used, the tool itself must be enabled. This will create a "Pipelines / workflow" column in the planning view and in the backlog, allowing for assigning a specific pipeline or workflow to an item.



The Pipeline, kanban and workflow tool

After the tool has been enabled, users can create and manage pipelines and workflows. One particularly important feature is the duplicate tool (found in the **More..** menu), typically used to extend and adapt a previously designed pipeline or workflow.

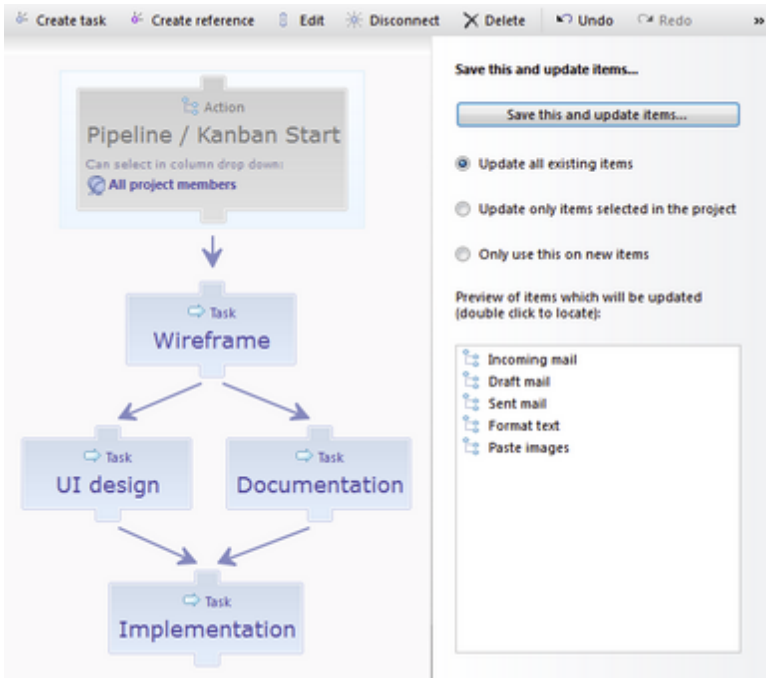


Duplicating a pipeline or workflow

Pipelines

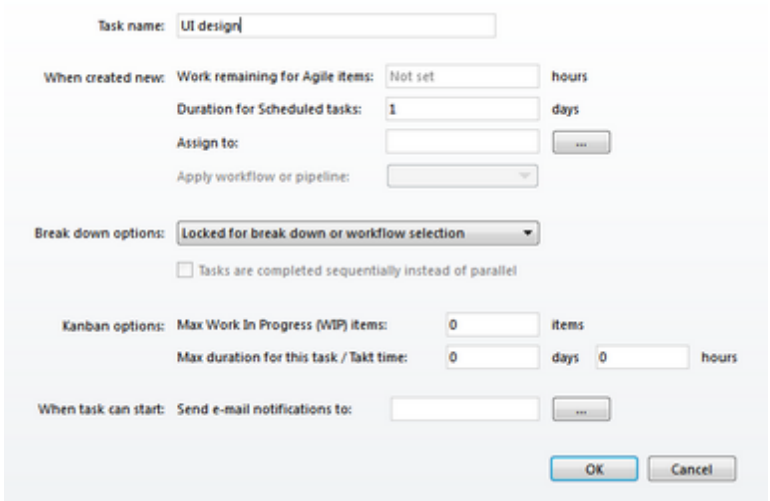
Pipeline fundamentals

A pipeline is used to structure work done on complex tasks that may have dependencies. It is made up of pipeline tasks, each of which represents a step in the pipeline. Tasks are then connected, to represent the dependencies that exist, enabling a wide variety of possible pipelines that can have both sequential and parallel chains.



A pipeline showing both sequential and parallel work

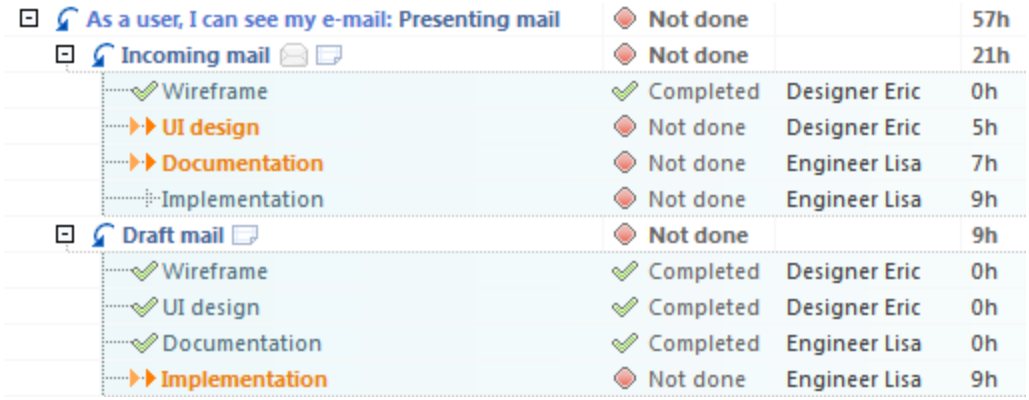
Pipelines can be set up with default behaviors for assignment, work estimates, and restrictions for if and how tasks can be broken down into further subtasks.



The properties dialog for a pipeline task

When a pipeline is applied to a task in the project schedule, subtasks will automatically be generated. Any tasks that can be worked on will be indicated, and appear in the To do lists of the users who the pipeline tasks have been assigned to. Beyond this point, pipeline tasks behave much like regular tasks, with a few

restrictions such as the inability to set priority (the priority is inferred from their order in the pipeline). Completing a pipeline task will progress the pipeline, activating dependent tasks.


As a user, I can see my e-mail: Presenting mail Not done 57h
Incoming mail Not done 21h
Wireframe Completed Designer Eric 0h
UI design Not done Designer Eric 5h
Documentation Not done Engineer Lisa 7h
Implementation Not done Engineer Lisa 9h
Draft mail Not done 9h
Wireframe Completed Designer Eric 0h
UI design Completed Designer Eric 0h
Documentation Completed Engineer Lisa 0h
Implementation Not done Engineer Lisa 9h

Pipelines in the schedule view

Building a pipeline / kanban

Pipelines are built by inserting pipeline tasks, and connecting them to illustrate the flow of work through the pipeline. In addition to adding pipeline tasks, references to other pipelines can also be inserted.

Pipeline tasks

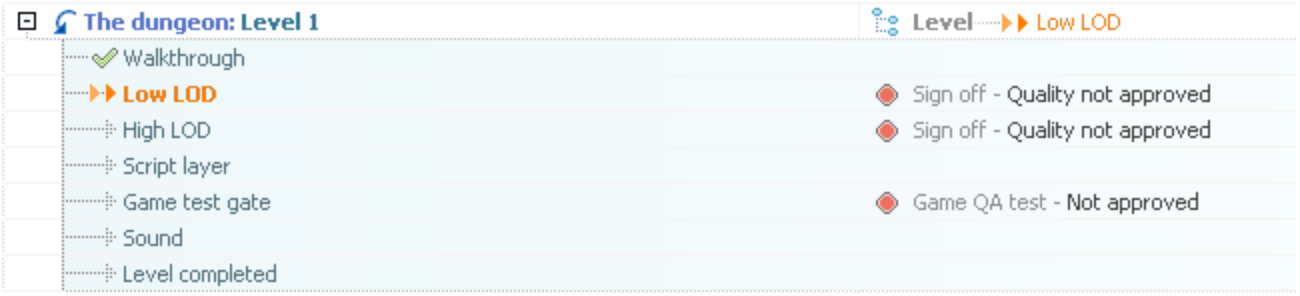
Jump to the next chapter if you want to know more about pipeline task settings.

Pipeline references

In a pipeline you can make a reference to another pipeline. This is very useful when building more complex pipeline structures.

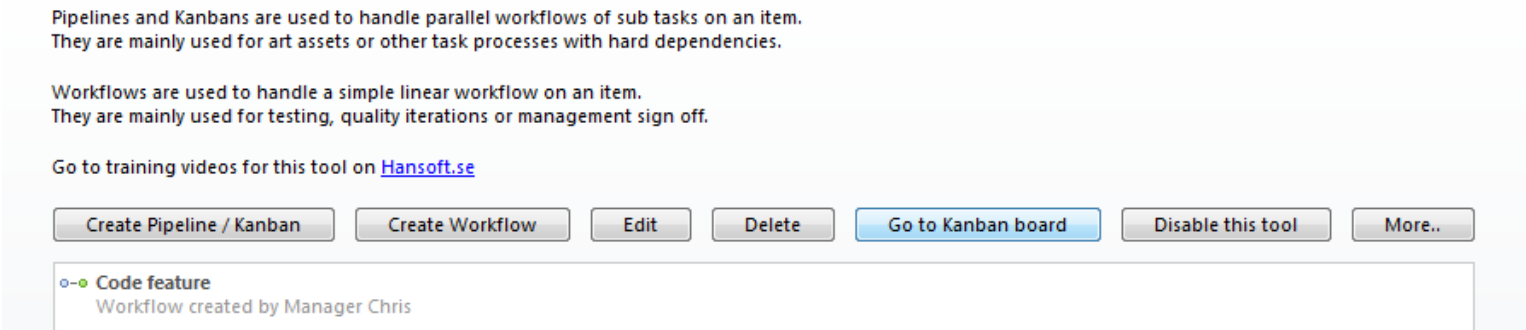
In the screenshot above pipeline "Level" is a reference in pipeline "Cutscene". This is reflected when selecting pipeline "Cutscene" in the planning view:

Pipeline "Level" can also be used as a standalone pipeline:



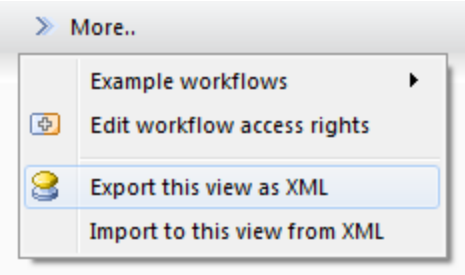
Kanban board view

A powerful visualization of and a way of working with pipelines is through the Kanban board view. If you go back to the "Pipelines, kanbans & workflows" window you go can go to the board view directly:


Pipelines and Kanbans are used to handle parallel workflows of sub tasks on an item.
They are mainly used for art assets or other task processes with hard dependencies.
Workflows are used to handle a simple linear workflow on an item.
They are mainly used for testing, quality iterations or management sign off.
Go to training videos for this tool on Hansoft.se
Create Pipeline / Kanban
Create Workflow
Edit
Delete
Go to Kanban board
Disable this tool
More..
Code feature
Workflow created by Manager Chris

Exporting and importing pipelines

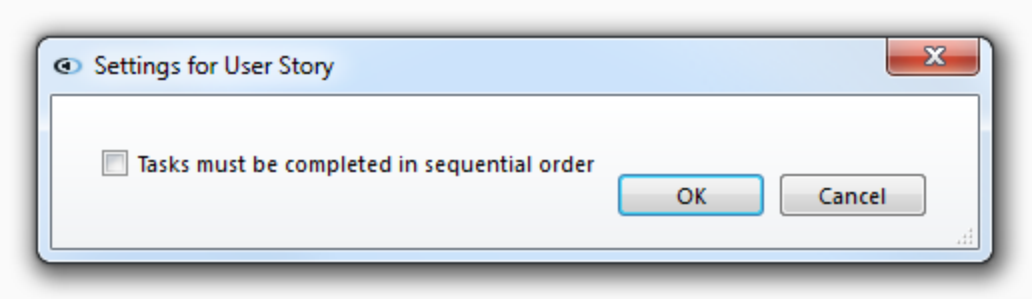
Under the **More..** menu you can export and import your pipelines as XML. This is useful when transferring pipelines between projects or databases.



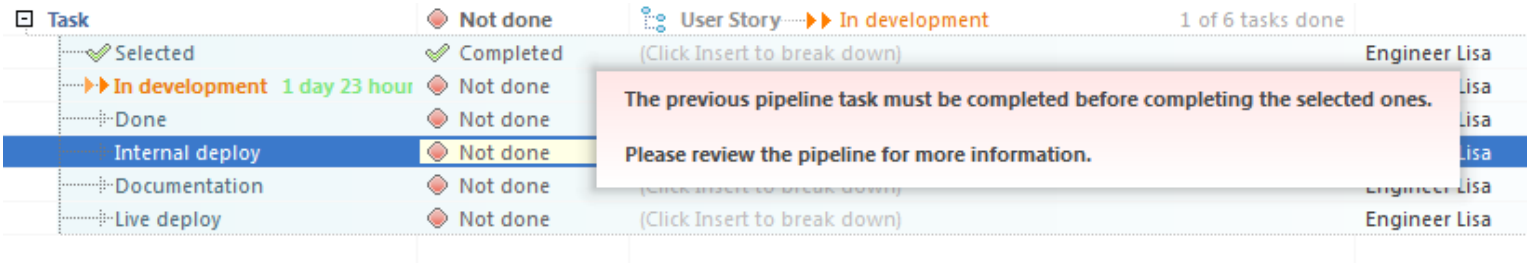
Pipeline settings

In the **More..** menu, under Pipeline settings, you can decide on settings affecting the whole pipeline (but not pipeline references).

Here you can decide if the pipeline must be completed in sequential order or not.

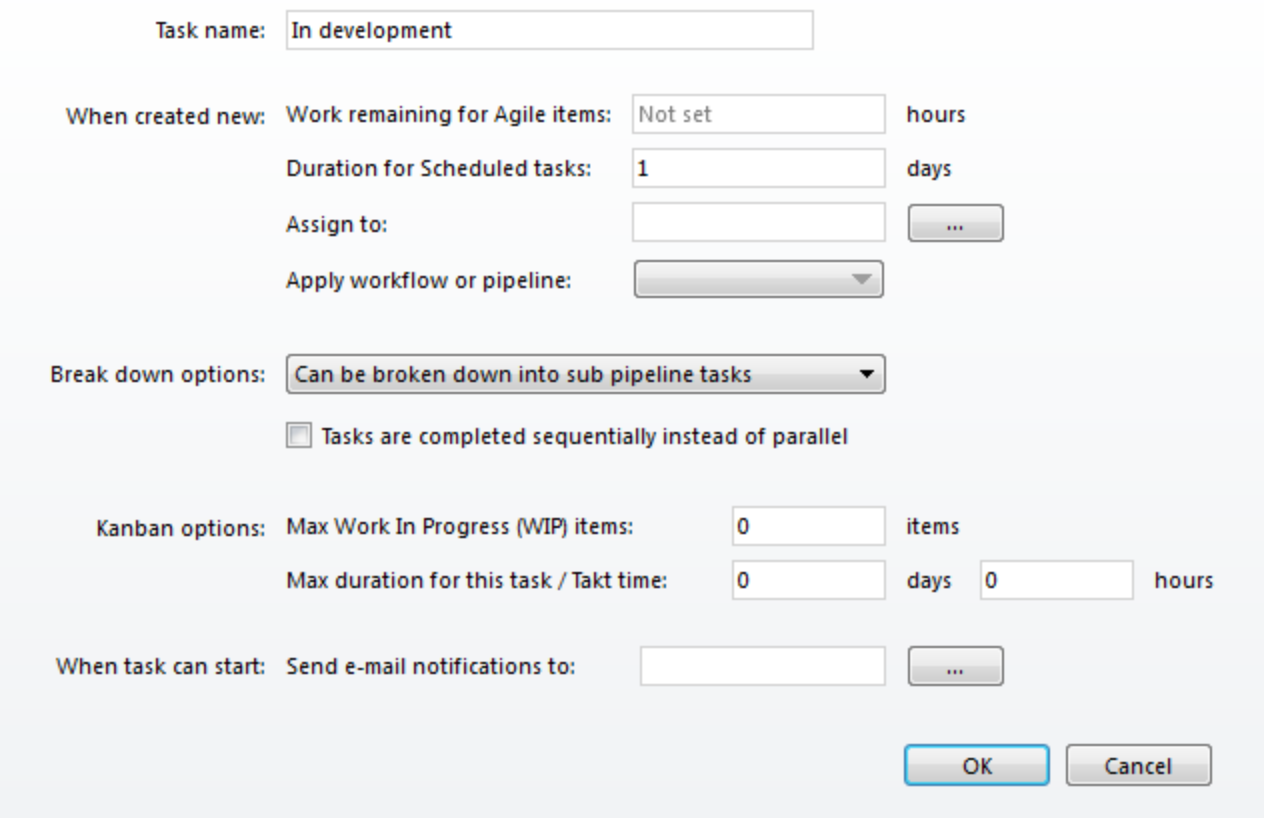


If a pipeline must be completed in sequential order team members will not be able to change item status before it can start.



Pipeline task settings

Editing a pipeline tasks brings up this window:



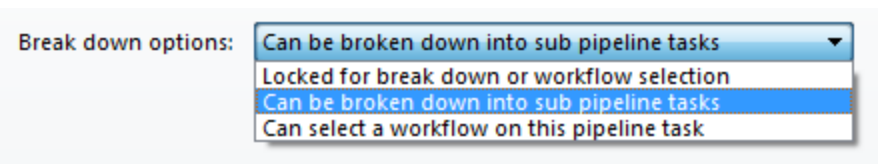
Pipeline task settings

The pipeline task name is reflected when selecting a pipeline in the planning view.

Options for newly created pipelines

When a new task is created, it can be given a default work remaining or duration, be automatically assigned to a user or user group, and have a particular workflow or pipeline applied to it.

Breaking down tasks


Break down options:
Can be broken down into sub pipeline tasks
Locked for break down or workflow selection
Can be broken down into sub pipeline tasks
Can select a workflow on this pipeline task

Pipeline tasks can be allowed or restricted in terms of how they can be broken down, and whether a workflow can be applied to the pipeline tasks. Enabling break down lets users insert or paste sub-tasks on the pipeline task in the planning view. Letting users select a workflow is useful for quality sign-offs on pipeline tasks.

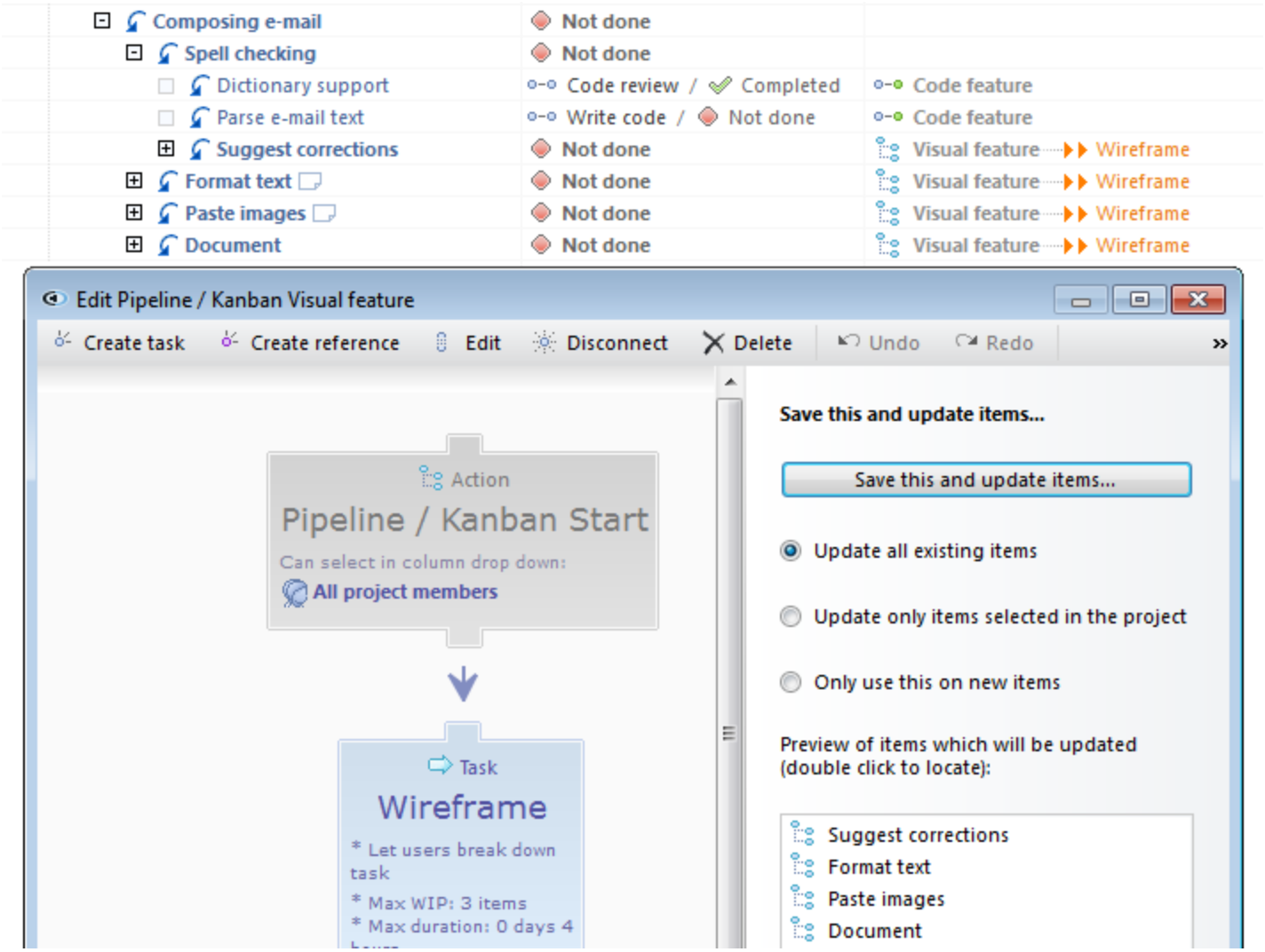
Kanban options are described in the Kanban chapter.

Note: Whenever a pipeline is updated, certain information (user assignments, rescheduling, work remaining etc.) might be destroyed. For this reason, the options above apply to newly created tasks, rather than existing ones.

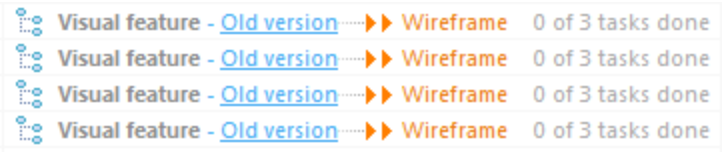
Updating and deleting pipelines

After you have edited a pipeline you have the option to update items in the planning view and backlog with these changes.

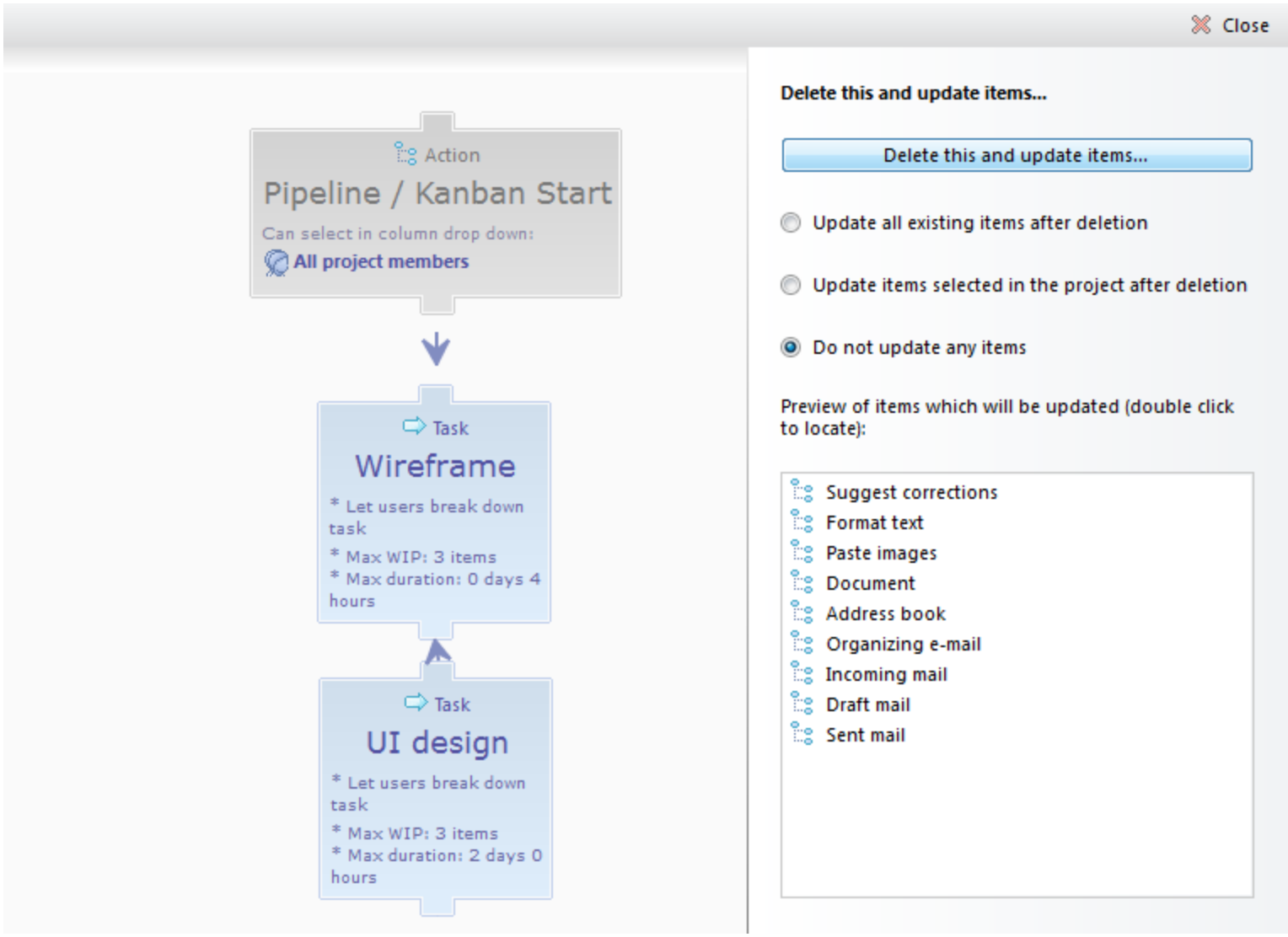
You can update all existing items, selected items or only apply the changes to new items.



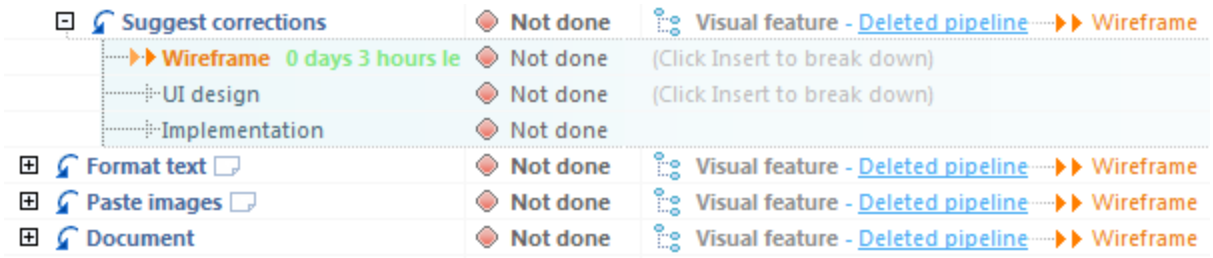
If you do save your changes and not update items they will have a hyperlink "Old version" to the right of the pipeline name. Clicking this you can either update to the latest version or view the old version of the pipeline:



Likewise, if you delete a pipeline you will have the option to update items:

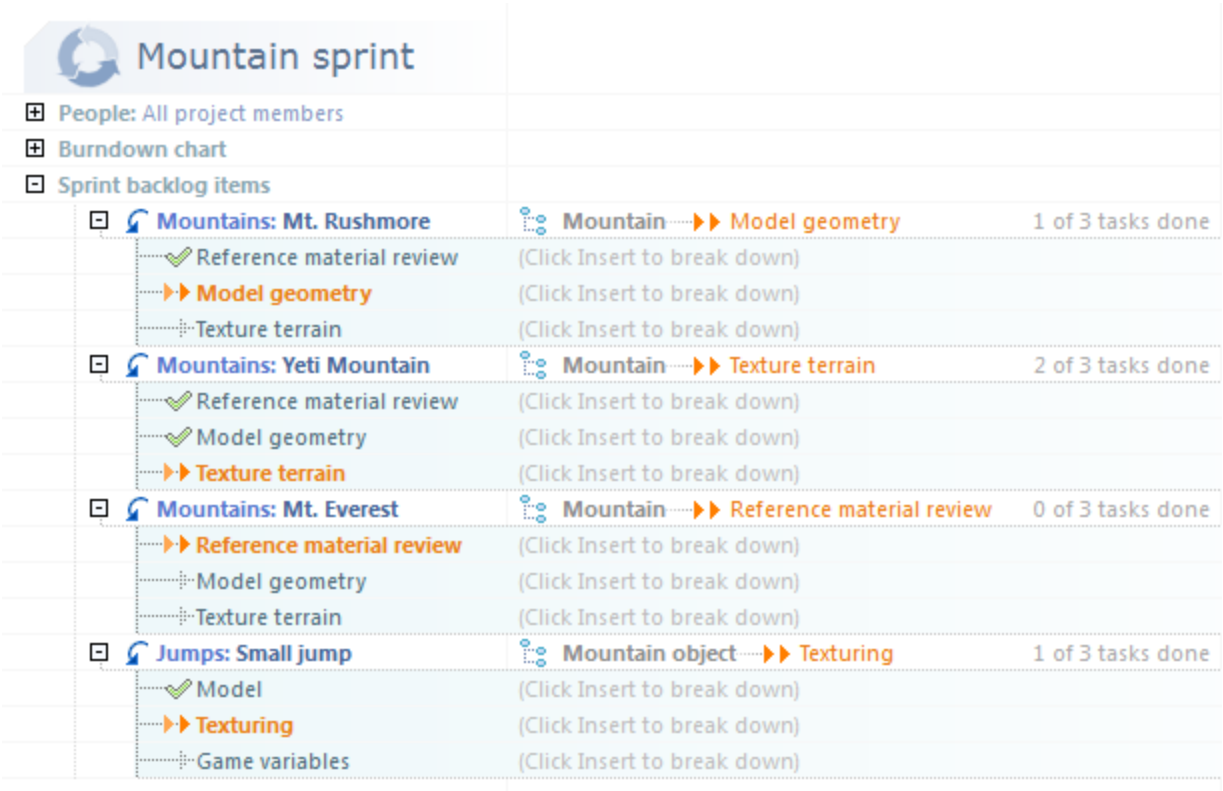


Leaving items without updating them will result in a "Deleted pipeline" text hyperlink where you can choose to delete pipeline again and update items:



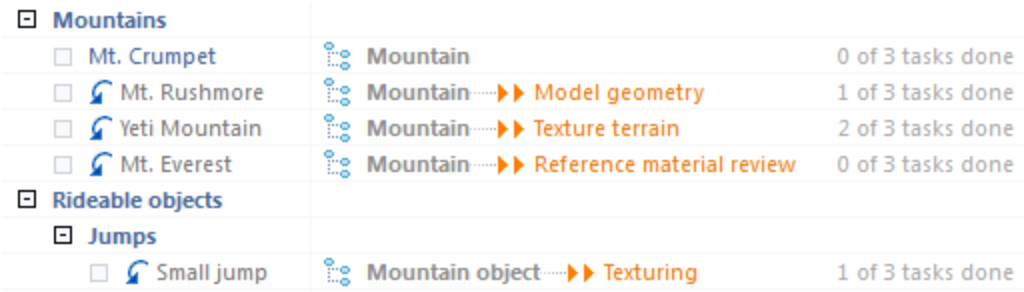
Pipelines in the product backlog

While in a sprint, items with a pipeline will appear with all the steps visible as individual rows.



Pipeline tasks in a sprint

In the product backlog, on the other hand, pipeline items will appear as single-row summaries. The backlog is intended to provide a more aggregated view, not primarily dealing with individual tasks.



Pipeline tasks in the backlog

By viewing the product backlog through the Priority view, which normally sorts items on their Product backlog priority, items can also be sorted on their pipelines. This is a convenient way of tracking how different pipelines are progressing, as the items will be sorted first whose pipelines have further progression.

Item name	Product backlog priority	Pipeline, Kanban or Workflow	
Jumps: Small jump	High priority	Mountain object ▸▸ Texturing	1 of 3 tasks done
Pipes: Long pipe	Low priority	Mountain object	0 of 3 tasks done
Jumps: Big jump	Medium priority	Mountain object	0 of 3 tasks done
Pipes: Halfpipe	Medium priority	Mountain object	0 of 3 tasks done
Mountains: Yeti Mountain	Very high priority	Mountain ▸▸ Texture terrain	2 of 3 tasks done
Mountains: Mt. Rushmore	Medium priority	Mountain ▸▸ Model geometry	1 of 3 tasks done
Mountains: Mt. Everest	Medium priority	Mountain ▸▸ Reference material review	0 of 3 tasks done
Mountains: Mt. Crumpet	Very low priority	Mountain	0 of 3 tasks done
Characters: Female rider	High priority	Character ▸▸ Rig	3 of 5 tasks done
Characters: Male rider	High priority	Character ▸▸ LOD step	2 of 5 tasks done
Characters: Yeti	Medium priority	Character ▸▸ Texture	1 of 5 tasks done
Characters: Spectator	Low priority	Character	0 of 5 tasks done

Backlog priority view sorted by pipeline

Items in the product backlog can be committed to a part of a pipeline that allows breaking itself down into sub-pipeline tasks. This further highlights the differing purposes of the backlog and the planning view: The backlog is for tracking progress on high-level goals or assets, while the planning view is for contextualizing that work for the team.

Rushmore sprint 2012-10-1			Not done
⊞ People: All project members			
⊞ Burndown chart			
⊟ Sprint backlog items			
⊟ Levels: Racing Rushmore Ridge	Level ▸▸ Mountain, Characters, Objects	10 of 26 tasks done	Not done
Walkthrough	(Click Insert to break down)		Completed
⊟ Mountain			Not done
⊞ Mountains: Mt. Rushmore	Mountain ▸▸ Model geometry	1 of 3 tasks done	Not done
⊟ Characters			Not done
⊞ Characters: Robot rider	Character ▸▸ Rig	3 of 5 tasks done	Not done
⊞ Characters: Spectator	Character ▸▸ Texture	1 of 5 tasks done	Not done
⊟ Objects			Not done
⊞ Jumps: Big jump	Mountain object	3 of 3 tasks done	Completed
⊞ Pipes: Long pipe	Mountain object ▸▸ Texturing	1 of 3 tasks done	Not done
⊞ Pipes: Halfpipe	Mountain object ▸▸ Model	0 of 3 tasks done	Not done
Script layer	(Click Insert to break down)		Not done
Game test gate	(Click Insert to break down)		Not done
Sound	(Click Insert to break down)		Not done

Pipeline items committed as steps in a larger pipeline

Kanbans

Working with Kanbans

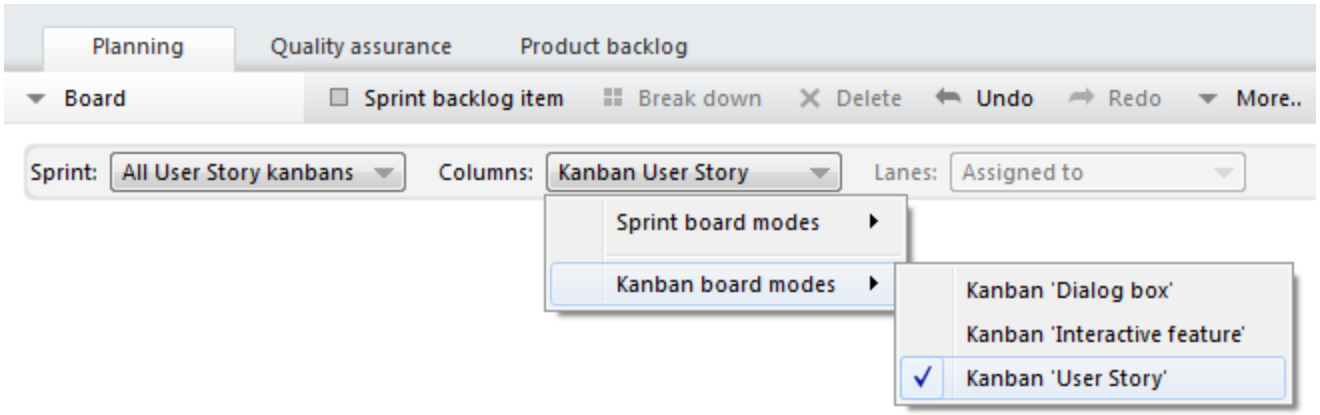
The Kanban board view is a powerful visualization of pipelines and has the unique functionality to handle parallel workflows.

Before entering this view you must first create a kanban.

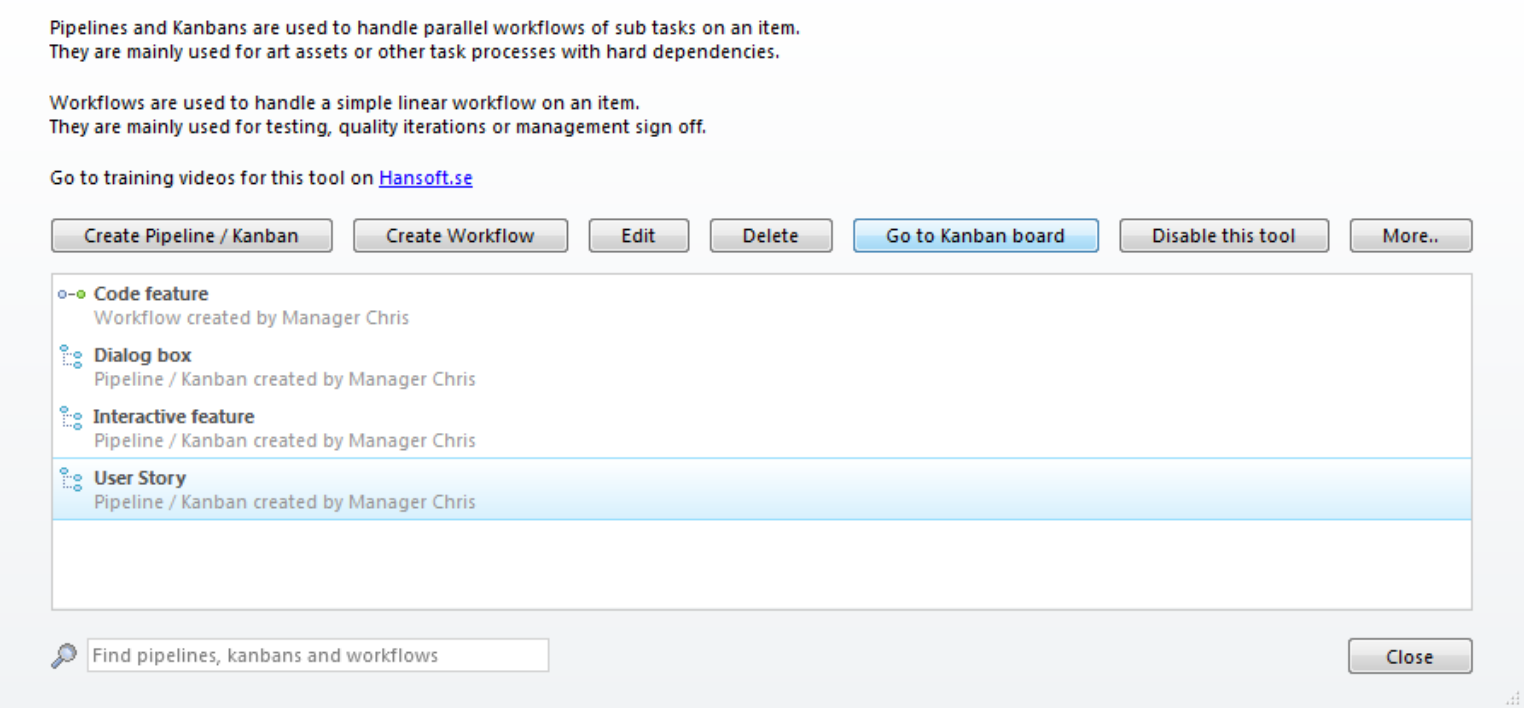
Accessing the Kanban view

The Kanban view can be accessed in two ways:

1) If you go to the board view and then select a Kanban board mode:



2) If you go to the Pipelines, kanbans & workflows window you go can go to the board view directly:


Pipelines and Kanbans are used to handle parallel workflows of sub tasks on an item.
They are mainly used for art assets or other task processes with hard dependencies.
Workflows are used to handle a simple linear workflow on an item.
They are mainly used for testing, quality iterations or management sign off.
Go to training videos for this tool on Hansoft.se
Create Pipeline / Kanban
Create Workflow
Edit
Delete
Go to Kanban board
Disable this tool
More..
Code feature
Workflow created by Manager Chris
Dialog box
Pipeline / Kanban created by Manager Chris
Interactive feature
Pipeline / Kanban created by Manager Chris
User Story
Pipeline / Kanban created by Manager Chris
Find pipelines, kanbans and workflows
Close

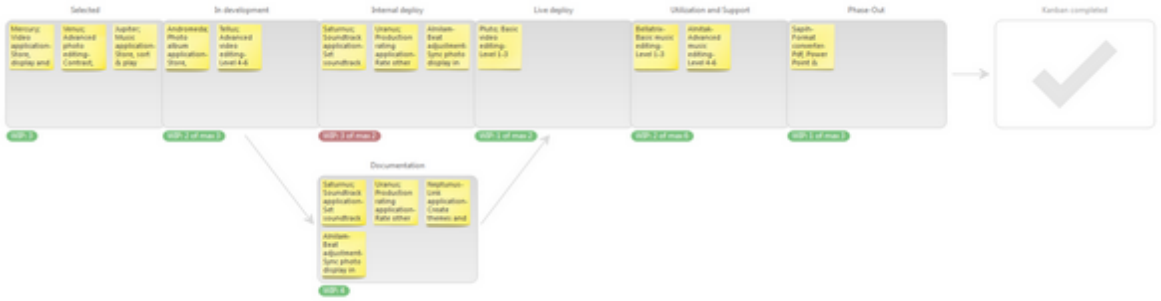
Working with the Kanban view

The Kanban view displays each step in the Pipeline / Kanban in a horizontal structure based on the dependencies within the Kanban.

- By dragging each Kanban item forward you complete a step in that Kanban.
- By dragging each Kanban item backward you set a step in that kanban to incomplete.
- By dragging an item to the Kanban completed flag you complete the whole Kanban at once.

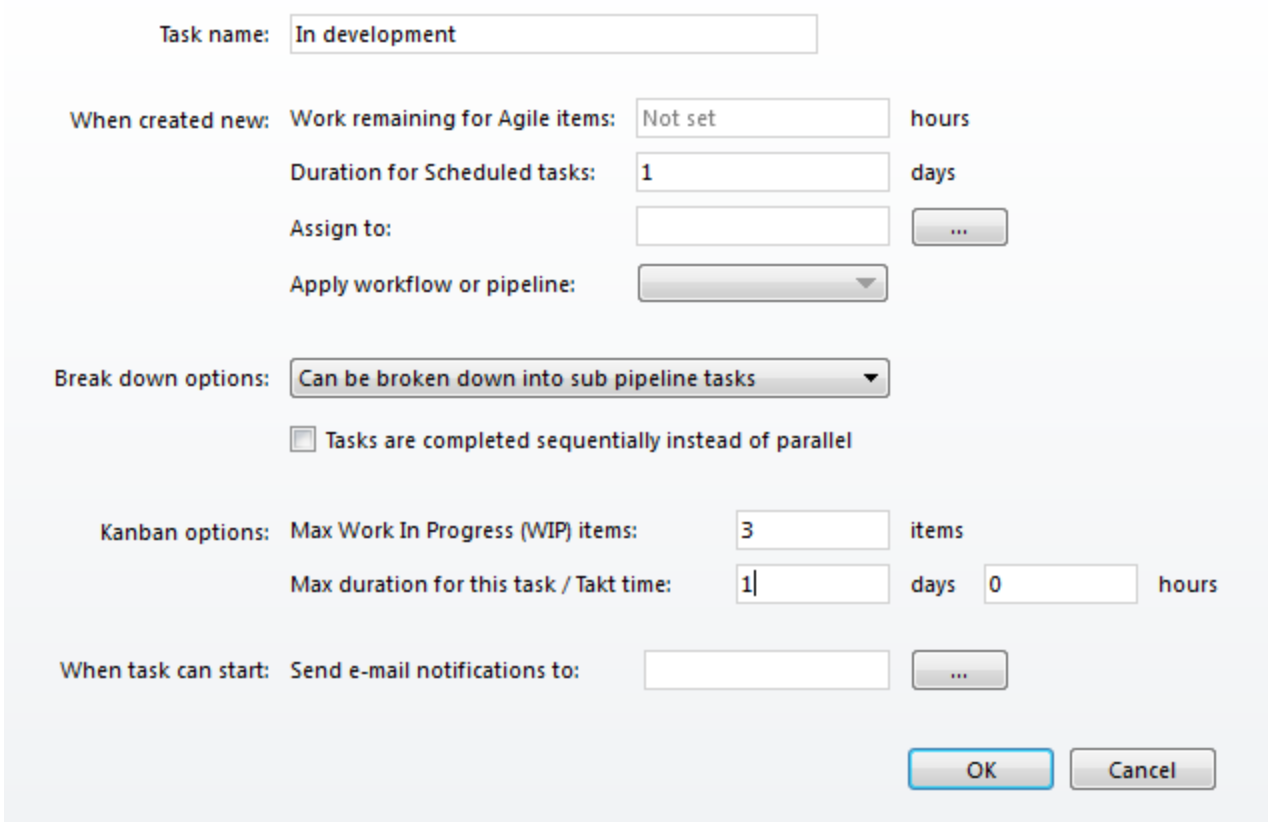
1. WIP means "Work In Progress" and tells you how many items are ongoing in each step. This is a powerful tool to see where bottlenecks exists within a project.

If cards turn red instead of green they are overdue, this is decided by Takt time / Max duration for this task which can be set on each step in the Kanban.

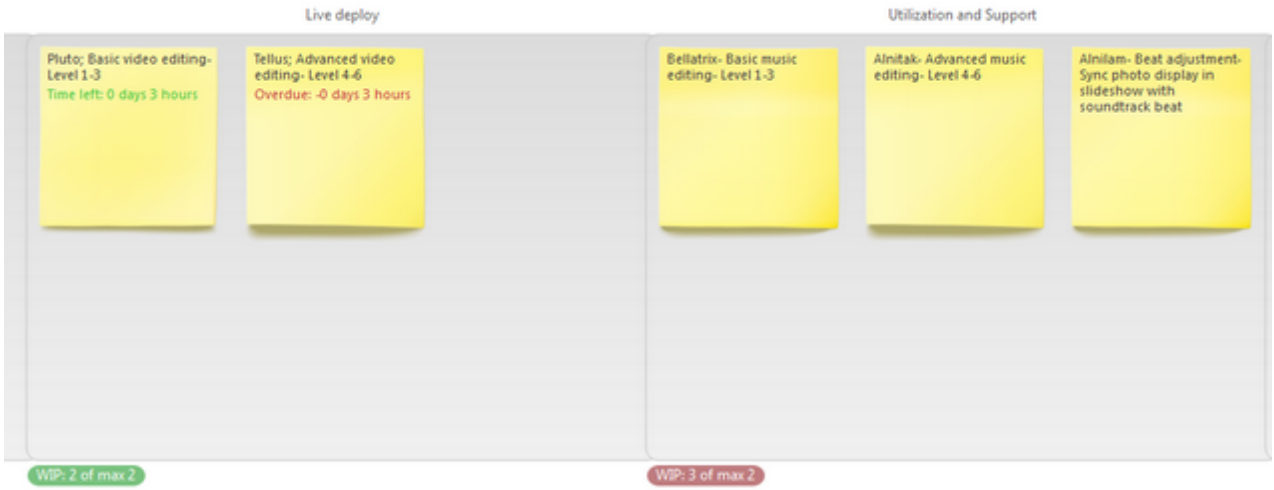


Kanban options for WIP and Takt time

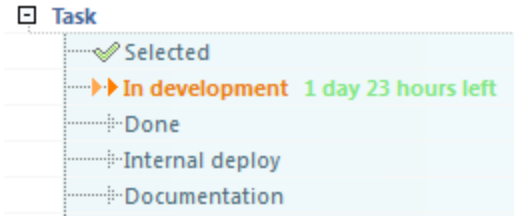
Two core Kanban options are available on a Kanban step: WIP (Work in Progress) maximum and Takt time / Max duration for this task



Setting them have this effect in the Kanban view, WIP turns red if there are too many items in that step and the "Time left" text turns red if an item is overdue in Takt time:


Live deploy
Utilization and Support
Pluto; Basic video editing- Level 1-3
Time left: 0 days 3 hours
Tellus; Advanced video editing- Level 4-6
Overdue: -0 days 3 hours
Bellatrix- Basic music editing- Level 1-3
Alnitak- Advanced music editing- Level 4-6
Alnilam- Beat adjustment- Sync photo display in slideshow with soundtrack beat
WIP: 2 of max 2
WIP: 3 of max 2

Takt time is also available in the Schedule view.



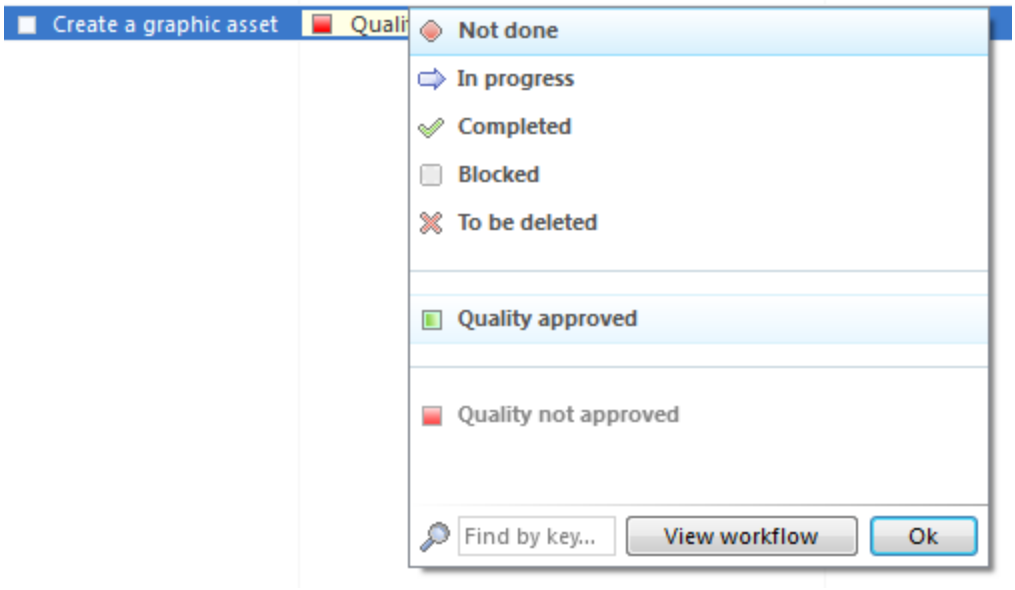
Workflows

Workflow fundamentals

A workflow is used to define the life cycle of a task. In contrast to pipelines, a workflow is applied to a single task, as opposed to spawning a sequence of tasks. Workflows are mainly used for task sign off, user story testing, art sign off or quality iterations.

A simple workflow for a task which involves approval of quality

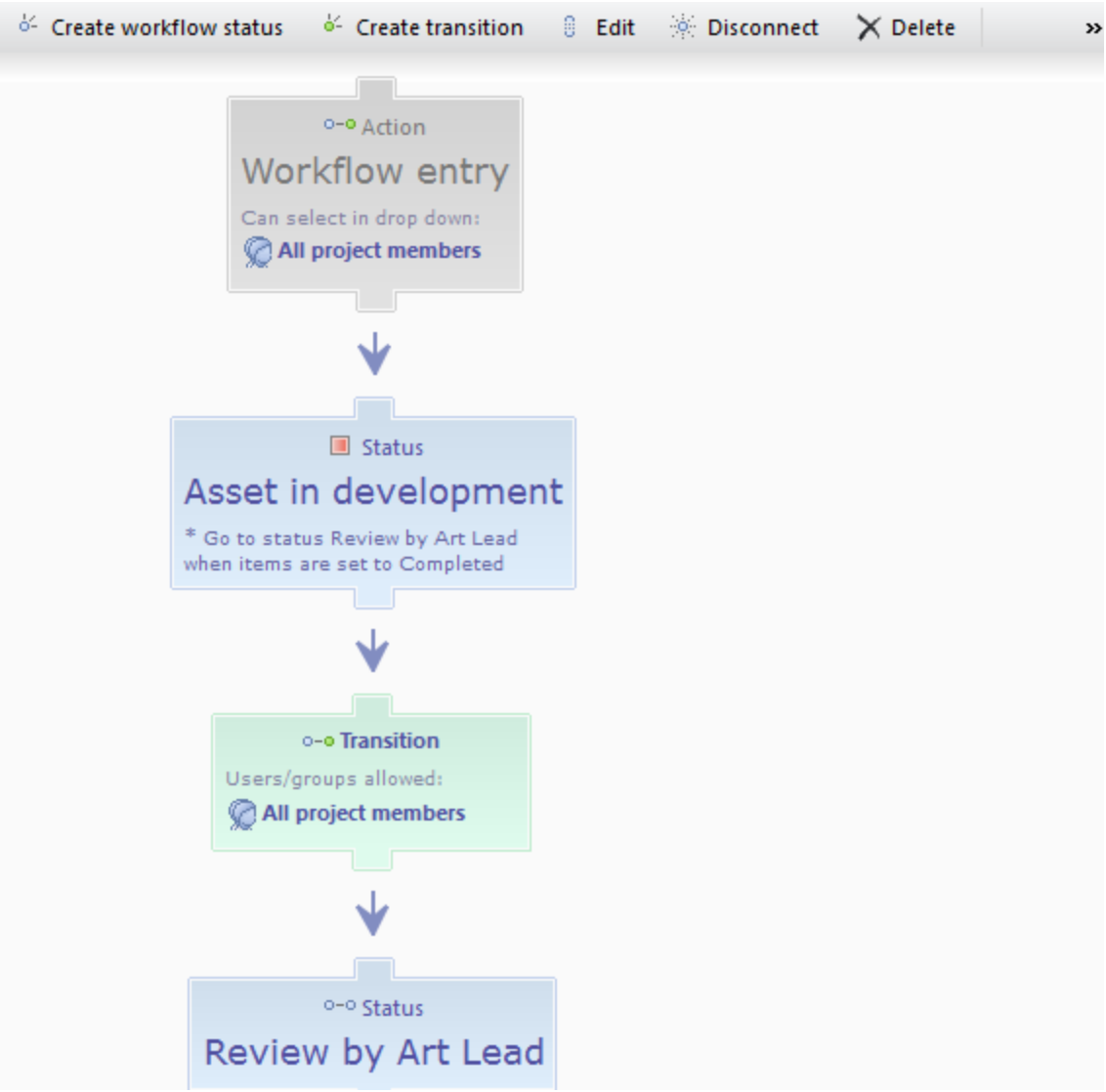
Setting a workflow on a task automatically progresses the workflow to the first workflow state. Going to the next status can be done manually, or can be triggered by changing the item status of the underlying item. Double-clicking the Status column will display a list of valid Item statuses, and workflow states, to which the item can progress.



Moving to the next state in a workflow by double-clicking the status column

Building a workflow

You build a workflow by inserting statuses and transitions shown here on the toolbar when editing.



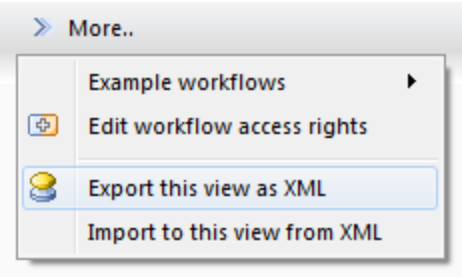
Editing a Sign-off workflow

Workflow status settings

Jump to the next chapter if you want to know more about workflow status settings.

Exporting and importing workflows

Under the **More..** menu you can export and import your workflows as XML. This is useful when transferring workflows between projects or databases.



Exporting and importing a workflow through the More menu

Workflow access rights

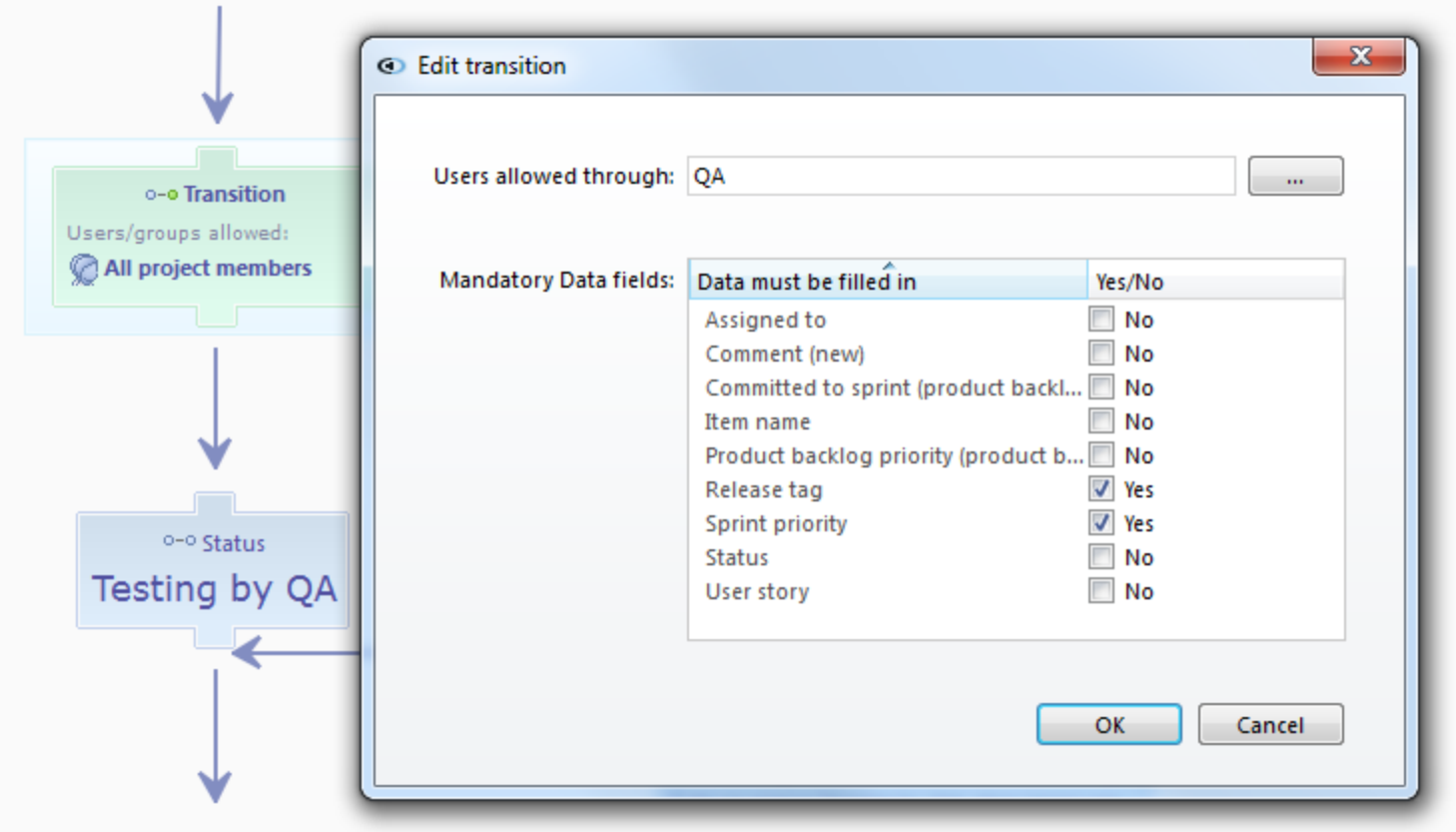
Users or user groups can be allowed to alter a workflow beyond the defined restrictions, giving them permission to edit the full item. This capability is set through the option Edit workflow access rights in the More menu.

For examples on using Workflow access rights, read Using workflows for testing user stories.

Workflow transitions

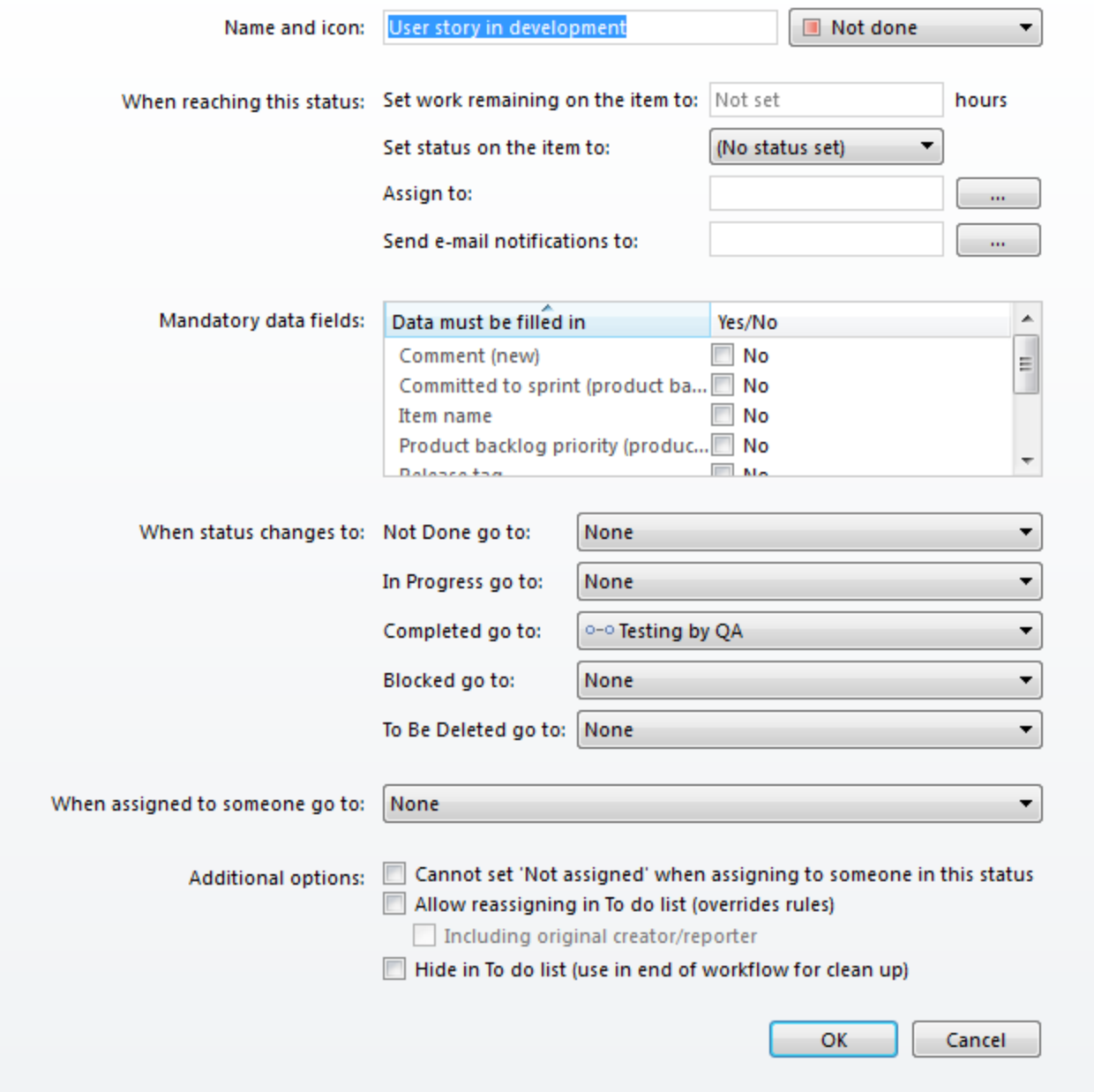
A workflow transition limits who can do the transition from one status to the next. You can also decide what data fields that must be filled in before going to the next workflow status.

In the example below, going from User story in development to Testing by QA can only be done by the user group QA Testers.



Defining allowed users in a workflow transition

Workflow status settings



Workflow status settings dialog

On a workflow status you have these options:

Basics

·Selecting a status name and icon.

·Select which data a user must fill in before leaving this status (for example, a comment must be written).

When reaching this status

Setting work remaining to X hours. Useful for quality iterations (alpha, beta or gold quality where each stage resets work remaining).

Assigning to users/group. For example auto assigning to user group QA Testers when reaching a testing stage in the workflow.

Sending E-mail notifications to users/groups. For example sending a mail when reaching status "Testing completed" to managers.

Settings item status (affecting both agile and scheduling items) to not done or completed. Useful in a "Testing failed" status when the item is reassigned to the user who was assigned to do the task in the first case before testing begun.

Additional options

Go to this workflow status when the item is assigned to someone.

Cannot set "Not assigned" when selecting a user in this status. Useful when users want to reassign the item to someone else. They should not be able remove all users from the item.

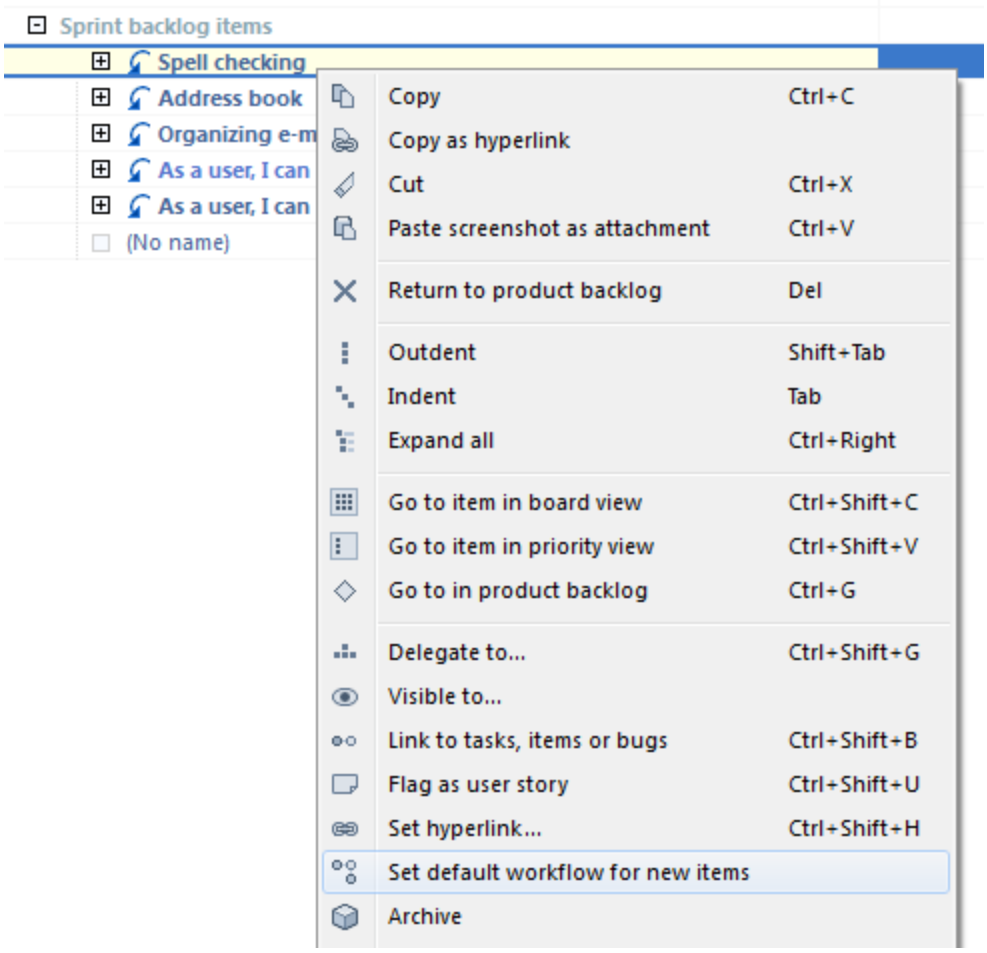
Let assigned users reassign the item to someone else in their To do list. Useful when a user thinks that another co-worker is better suited to perform the task.

Go to selected workflow status when the item is set to "Completed". Useful in a testing or art review scenario. When the task is done it is for example automatically set to workflow status "Testing by QA" and assigned to different testers.

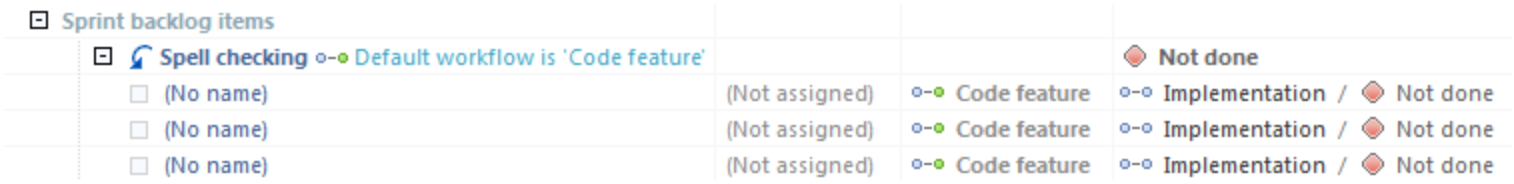
Default workflow for newly created tasks and items

Setting a default workflow for newly created tasks and items is a good practice since it can enforce the correct process to take place (when a task is done, go to testing for example).

To set default workflow for new tasks, right-click on a sub-project or sprint and select **Set default workflow for new items**.



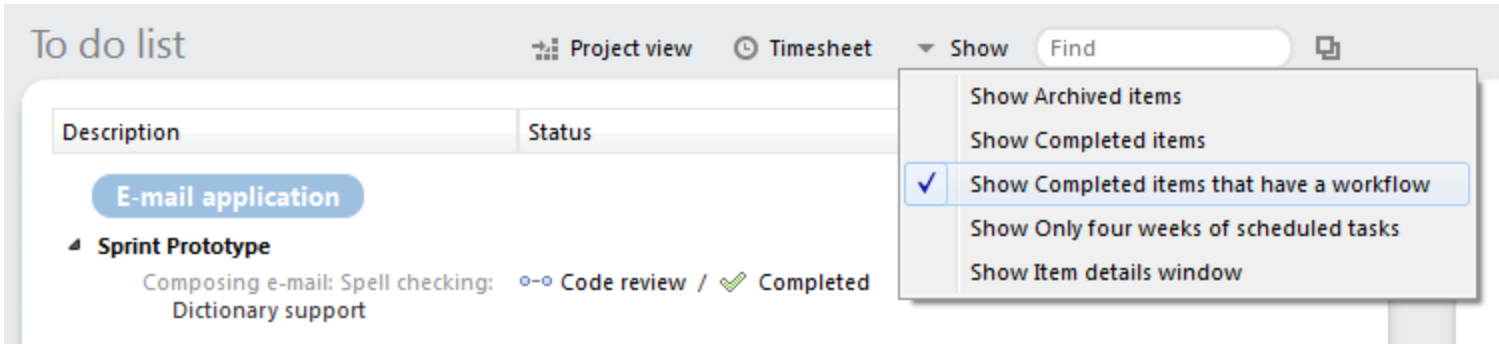
Setting the default workflow for new items


Sprint backlog items
Spell checking Default workflow is 'Code feature' Not done
(No name) (Not assigned) Code feature Implementation / Not done
(No name) (Not assigned) Code feature Implementation / Not done
(No name) (Not assigned) Code feature Implementation / Not done

New items having inherited the default workflow from their parent sub-task.

Workflows in the To do list

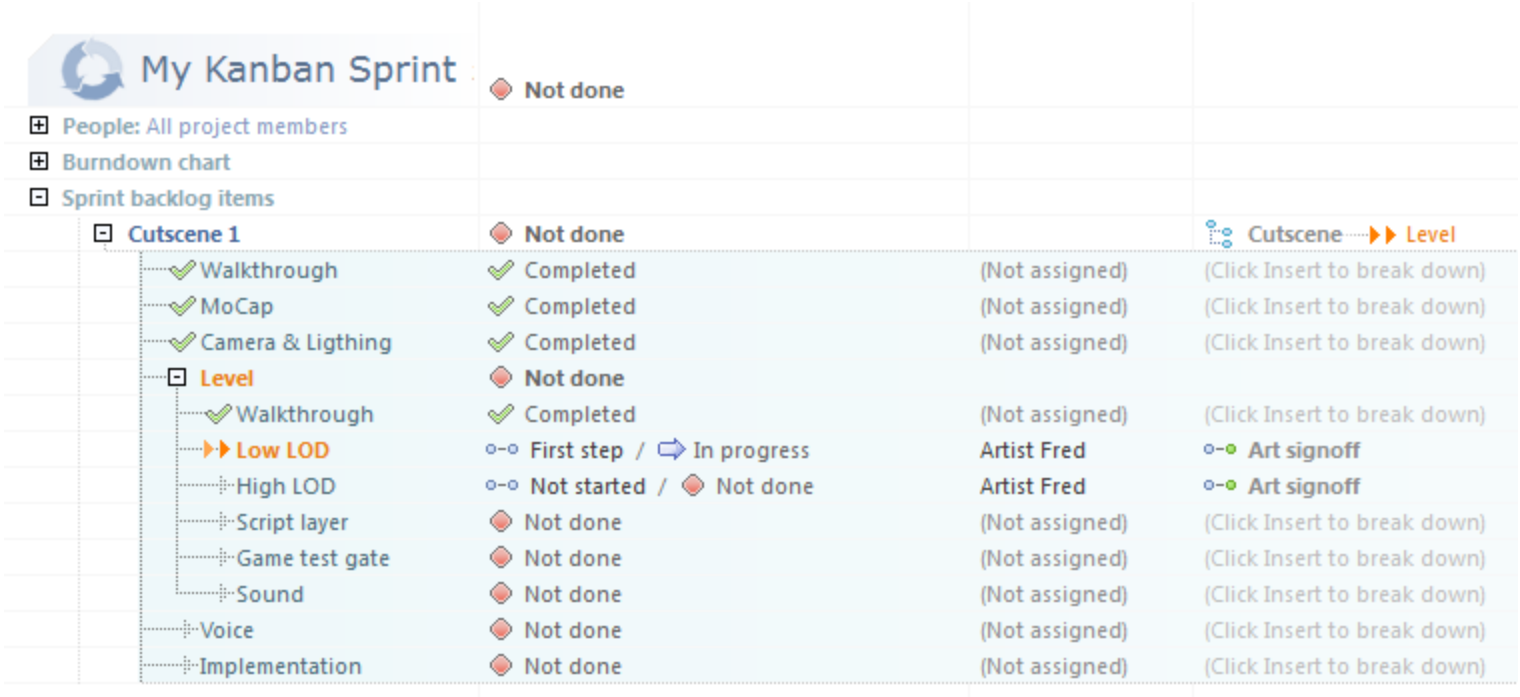
In the To-do list, an option can be enabled to always show items that have a workflow applied to them, even if their item status is set to Completed. This is to enable the item to be tested, reviewed or otherwise signed off where it would normally be hidden from the To do list.



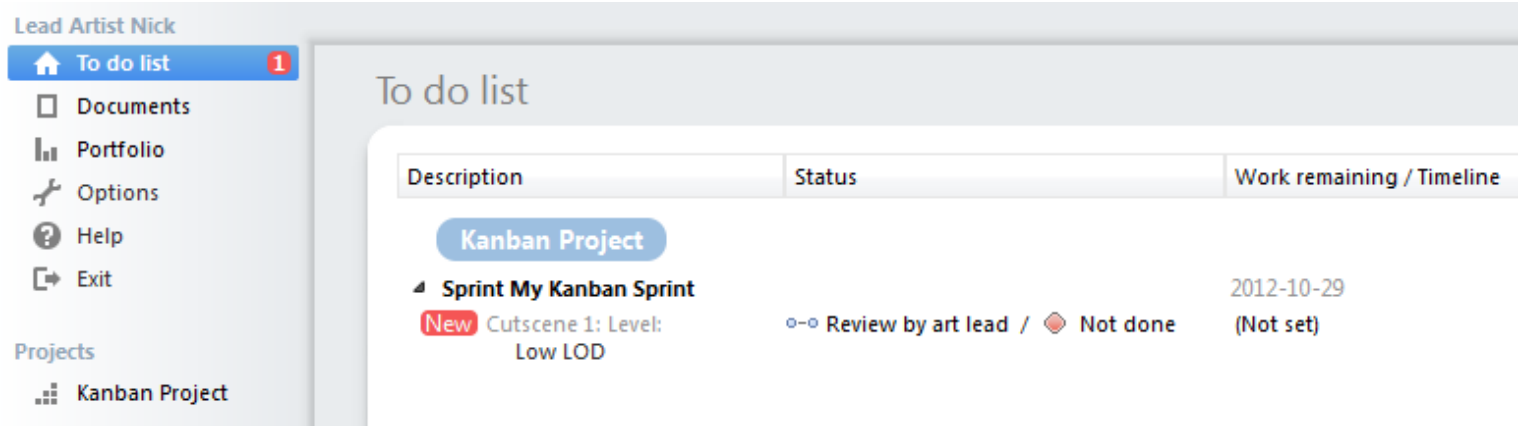
Workflow on a pipeline task

In a pipeline you can choose to have a workflow on a pipeline task. The strength of workflows is particularly apparent when combined with pipelines, providing a birds-eye view of the status of a pipeline.

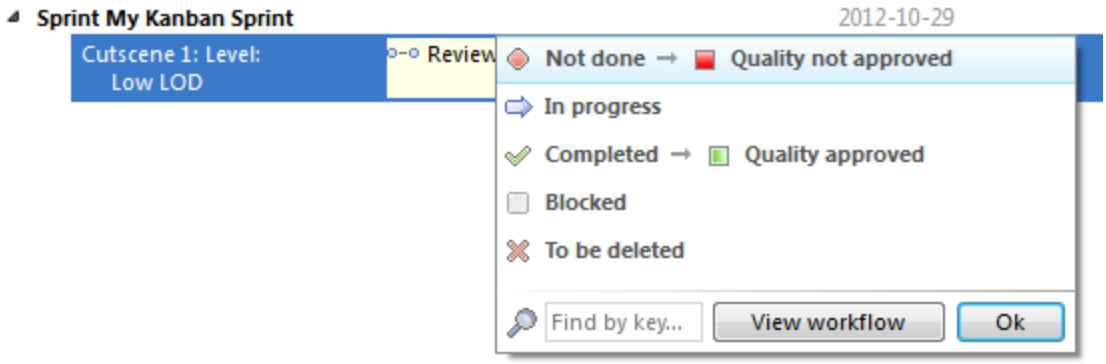
In the following example, an art Sign off workflow has been select on pipeline tasks "Low LOD" and "High LOD". The Low LOD step, when completed, will be assigned to the art lead for review.



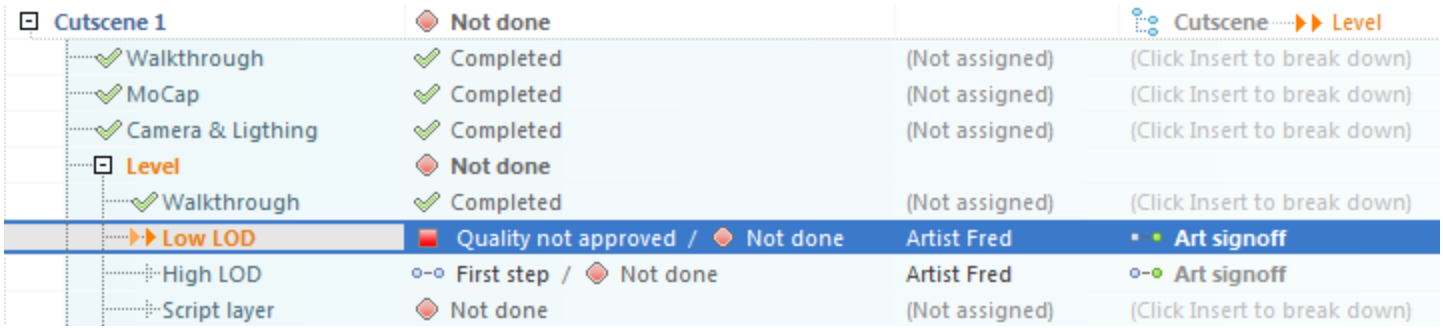
The art lead now has the task in their To do list, ready for review.



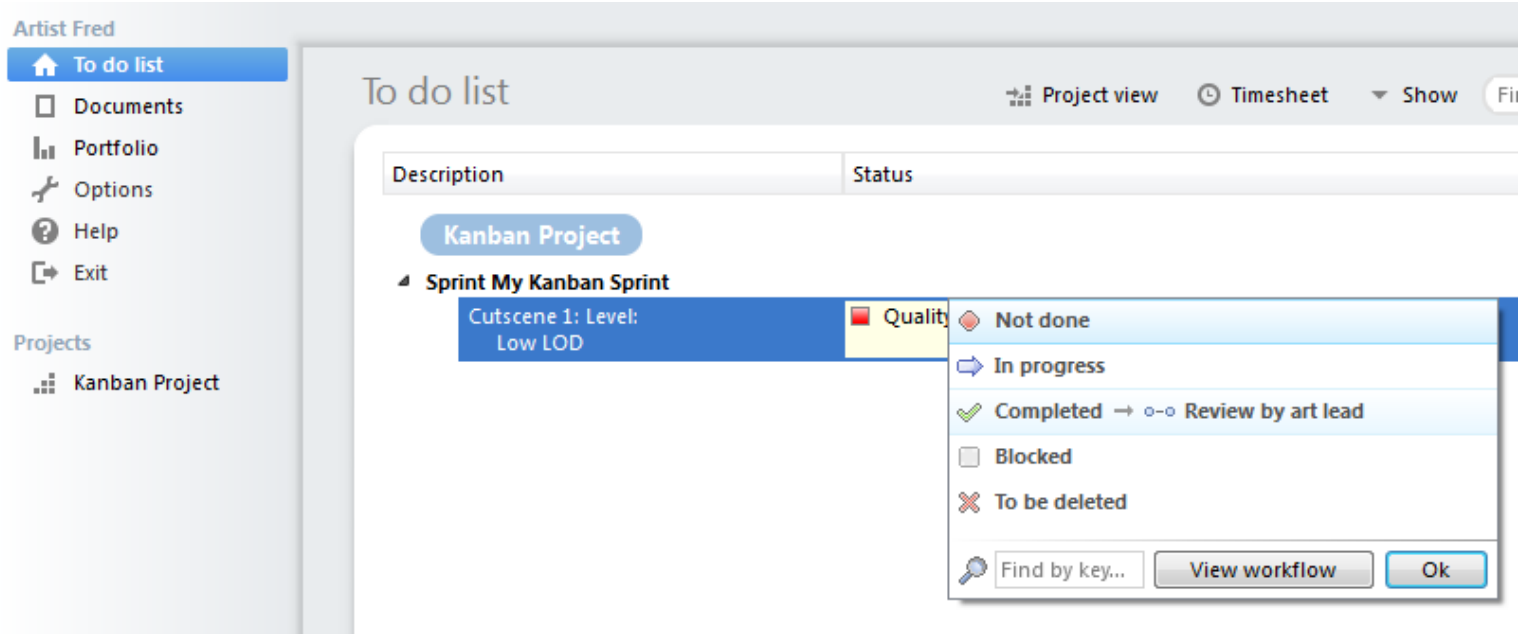
The art lead can choose to either approve or disapprove of the quality of the task. As per how the workflow was designed, Quality not approved will send the task back to the artist for further work.



In the planning view the pipeline indication will now revert to "Low LOD" and "High LOD" because the quality was not approved (and the item was set to Not done). This will re-assign the task to the artist.



The artist again has the task in their To do list.

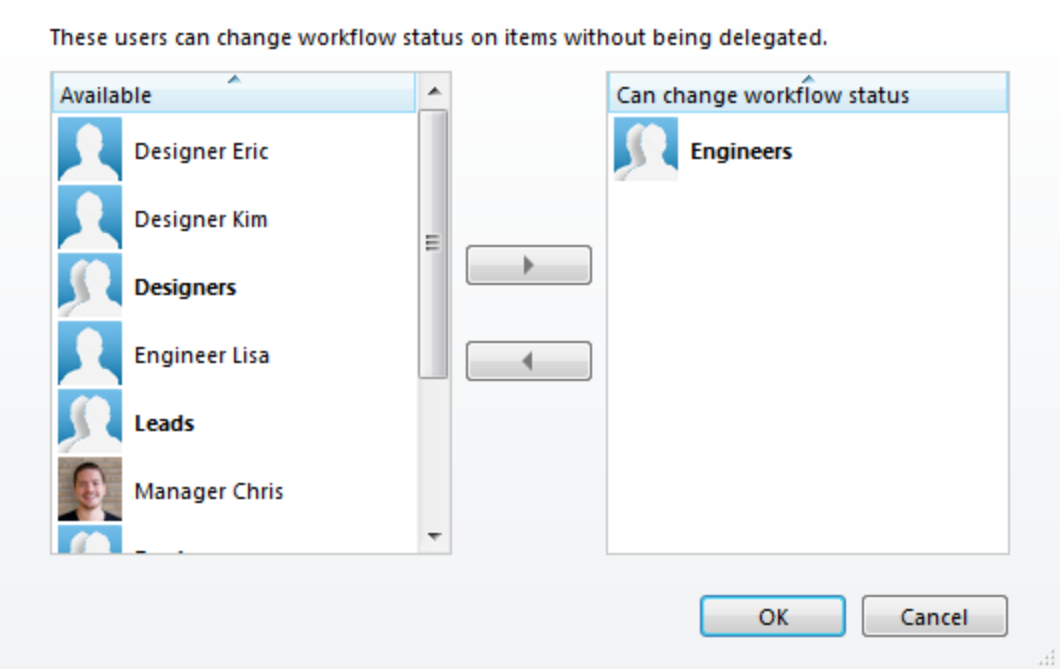


This review loop can continue indefinitely until the art lead sets the task to "Quality approved."

Using workflows for testing user stories

You can use workflows for testing completed tasks and user stories without delegating parts of the project or backlog.

This is useful when you want a group of testers to test user stories in the backlog without being able to change any property of the user story itself.

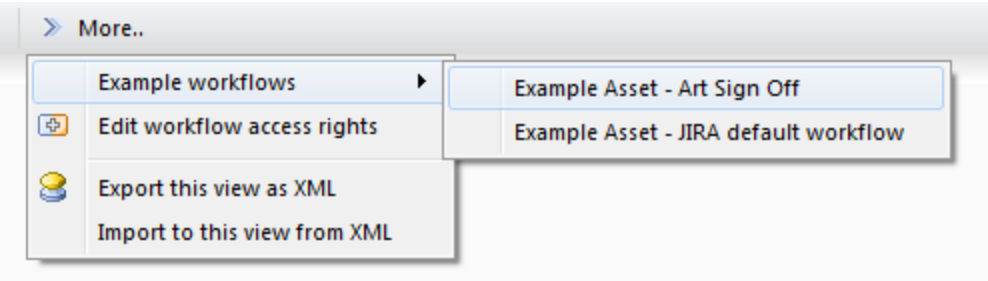


Setting access rights on workflow status

Example workflows

To quick start the use of workflow you do always have access to built in examples under the **More..** menu when editing a workflow.

Both the "Art Sign Off" and "User Story Testing" workflows are important examples on how to use Hansoft workflows in review processes involving multiple co-workers.

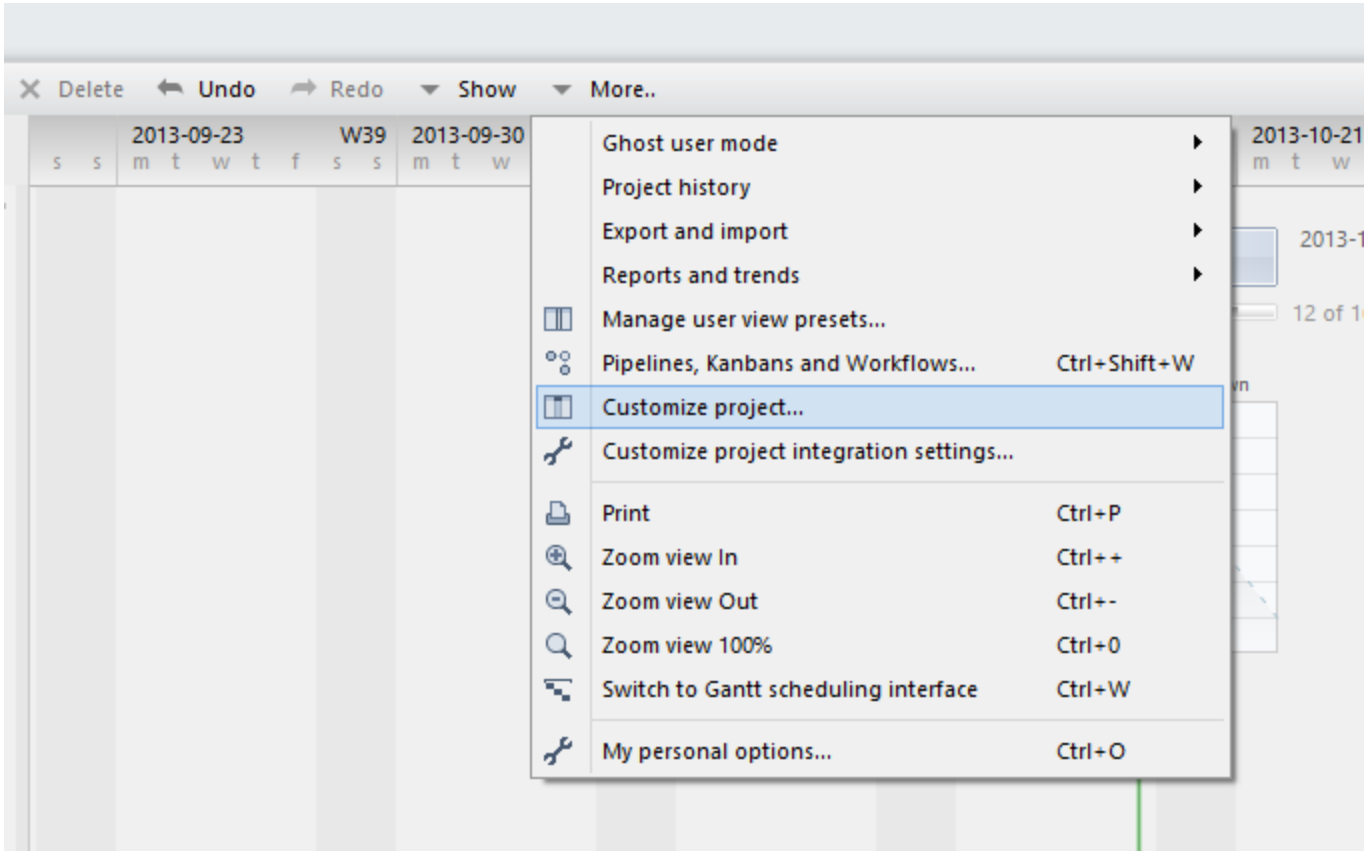

More..
Example workflows
Edit workflow access rights
Export this view as XML
Import to this view from XML
Example Asset - Art Sign Off
Example Asset - JIRA default workflow

Burndown prediction

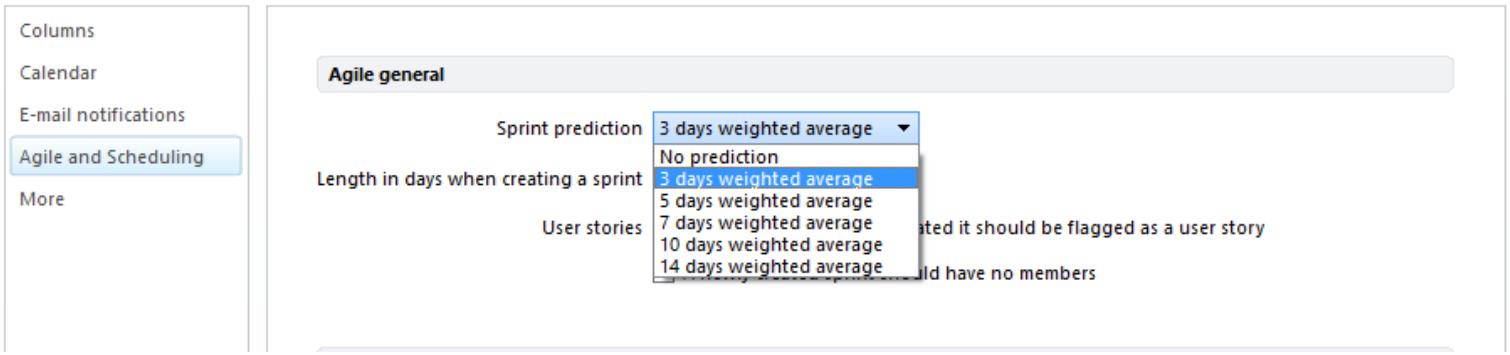
The burndown prediction in Hansoft is calculated using a weighted average.

This manual page will explain which calculations Hansoft preform to determine the "Predicted velocity" in a burndown chart.

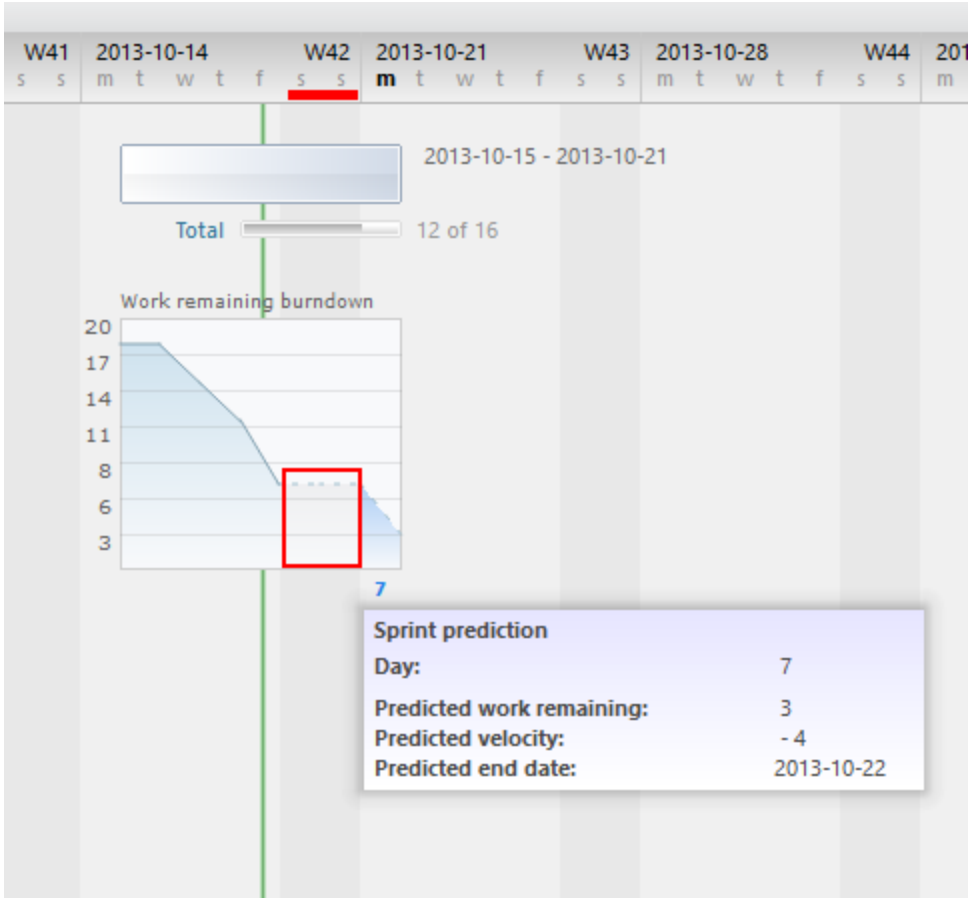
You can customize prediction settings in the "Customize project..." dialog.



This example will use a sprint prediction of "3 days weighted average".



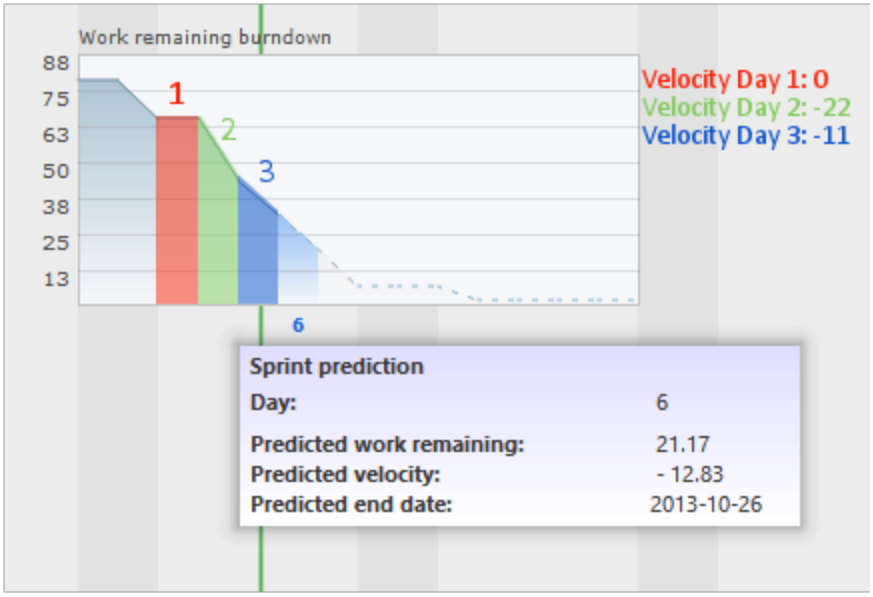
Weekends and holidays



The first thing to be aware of is that Hansoft ignores "Free days" such as holidays and weekends when predicting velocity.

Weekends are easy to identify by their darker shade of gray in the timeline.

The calculation



Velocity	Day
0	1
-22	2
-11	3

$$\frac{(velocity\ day\ 1\ x\ day\ nr) + (velocity\ day\ 2\ x\ day\ nr) + (velocity\ day\ 3\ x\ day\ nr)}{day\ nr + day\ nr + day\ nr}$$

The equation would then look something like this when we add values:

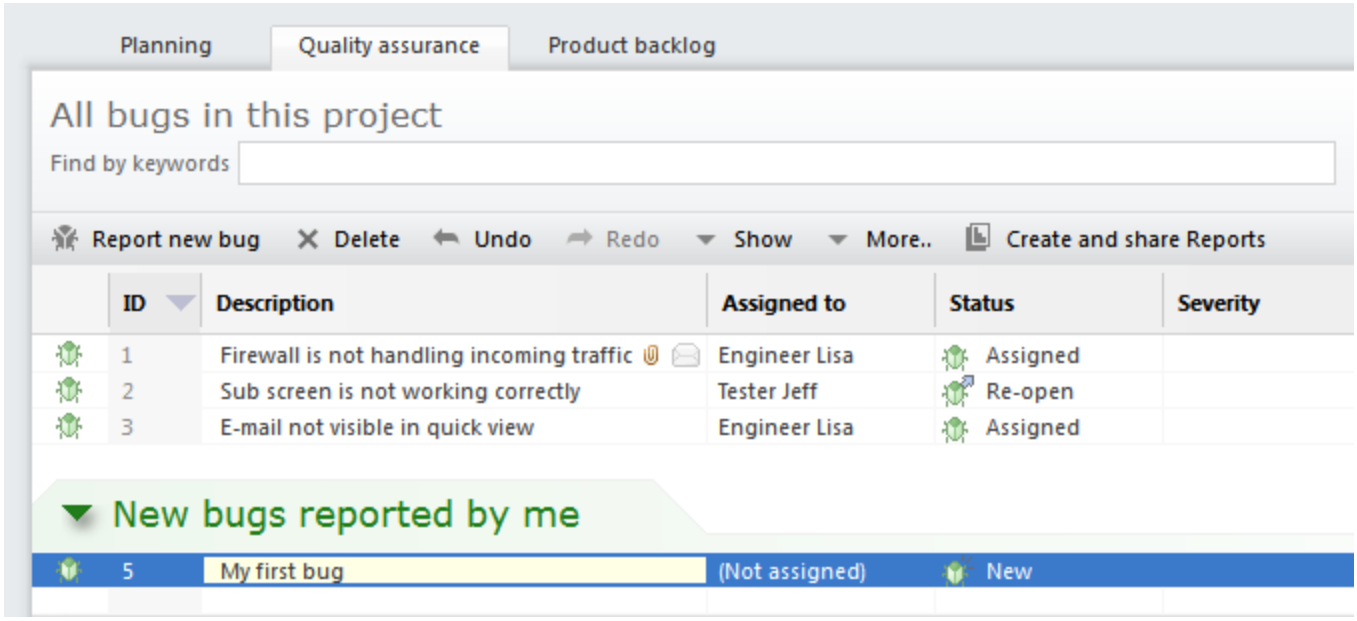
$$\frac{(0\ x\ 1) + (-22\ x\ 2) + (-11\ x\ 3)}{1 + 2 + 3} \approx -12.83$$

Fundamentals

Hansoft has full support for Quality Assurance (QA). QA in Hansoft is integrated with the project side, allowing co-workers to see schedule & agile tasks and bugs alongside one another in their To do list. Hansoft

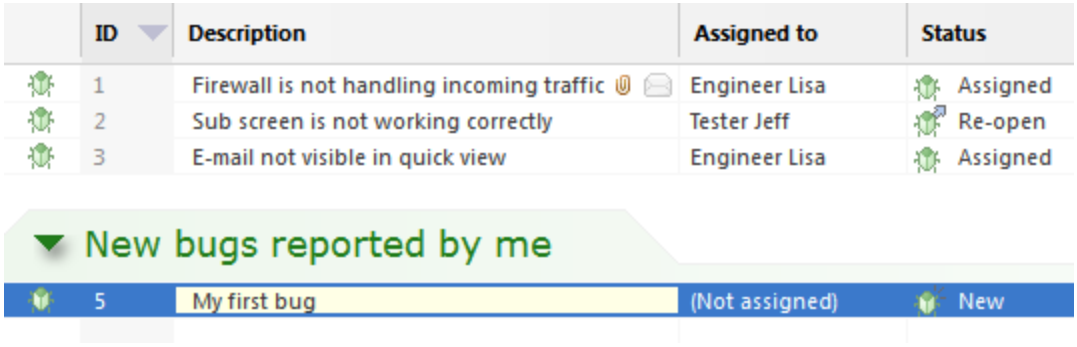
offers extensive functionality to customize workflow, add extra columns etc. This is covered in later sections of this help manual.

QA is handled under the **Quality assurance** tab.

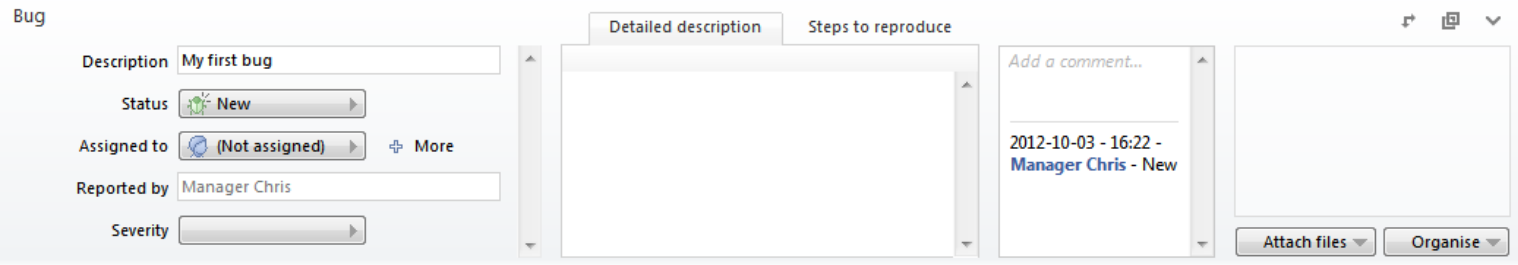


Reporting and editing bugs

To report a bug in Hansoft, click on Report new bug or press Ctrl + N (Cmd + N):

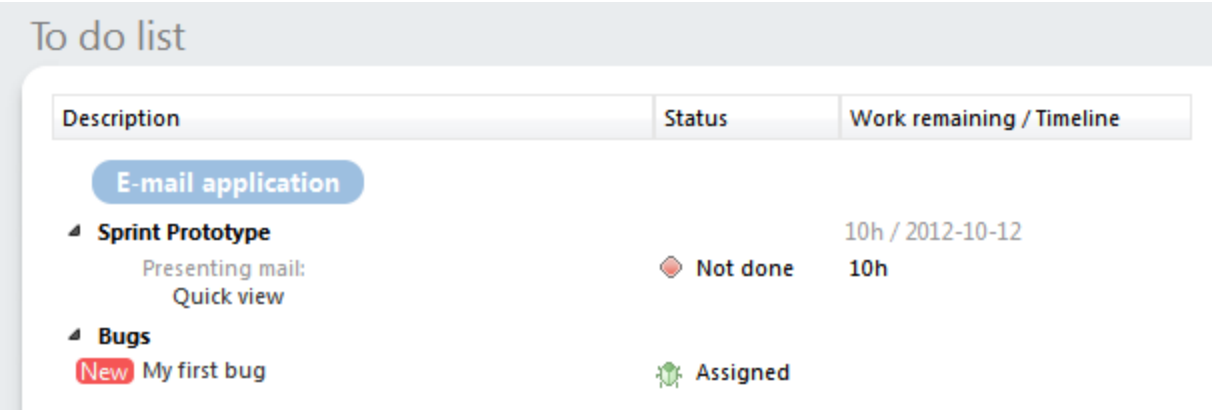


To edit a bug in Hansoft, utilize the bug details window. Here you can set all the bug data in all columns, add detailed description, steps to reproduce and comments:



Please note that you can use html tags such as <bold> and </bold> or <URL-L=www.hansoft.se>Hansoft</URL> on comments, detailed description and steps to reproduce.

When bugs are reported, they will pop up as new bugs in the assigned user's To do list.

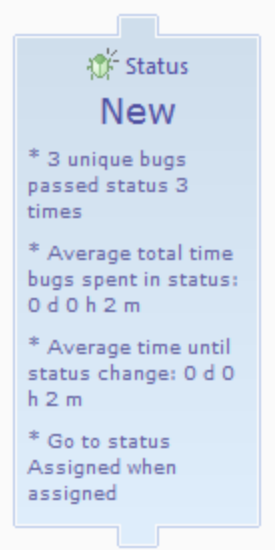


Bug workflow statistics

You can analyze how many bugs pass through a bug status and how long they remain in that status.

This can give useful information with regard to how long it takes for a bug to be fixed or verified. In other words, this functionality can identify potential bottlenecks in the quality assurance process.

Go to the bug workflow and press **Show status statistics** on the toolbar:


Status
New
* 3 unique bugs passed status 3 times
* Average total time bugs spent in status: 0 d 0 h 2 m
* Average time until status change: 0 d 0 h 2 m
* Go to status Assigned when assigned

Bug workflow

One of the most fundamental parts of Hansoft QA is the bug workflow. The bug workflow is unique for each project and is fully customizable. Each and every bug is bound to the workflow and only "Main project managers" can override it.

The bug workflow

The bug workflow decides:

·Which bug statuses there are ("New" or "Assigned" or "My own bug status") and their visual appearances

·How the bug workflow is progressing (going from "New" to "Assigned" and from "Verified" to "Closed" for example)

·Who can report bugs

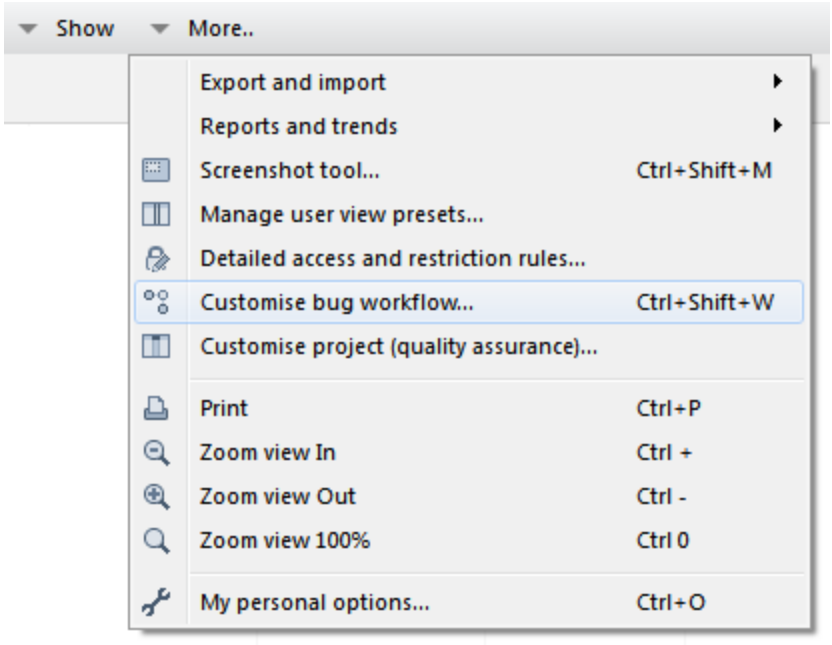
·Who can go from one bug status to another (only user group "QA Testers" can go from "Resolved" to "Verified" for example)

·Auto assigning bugs to an individual or user groups (such as user group "QA Testers" for example) when reaching a bug status

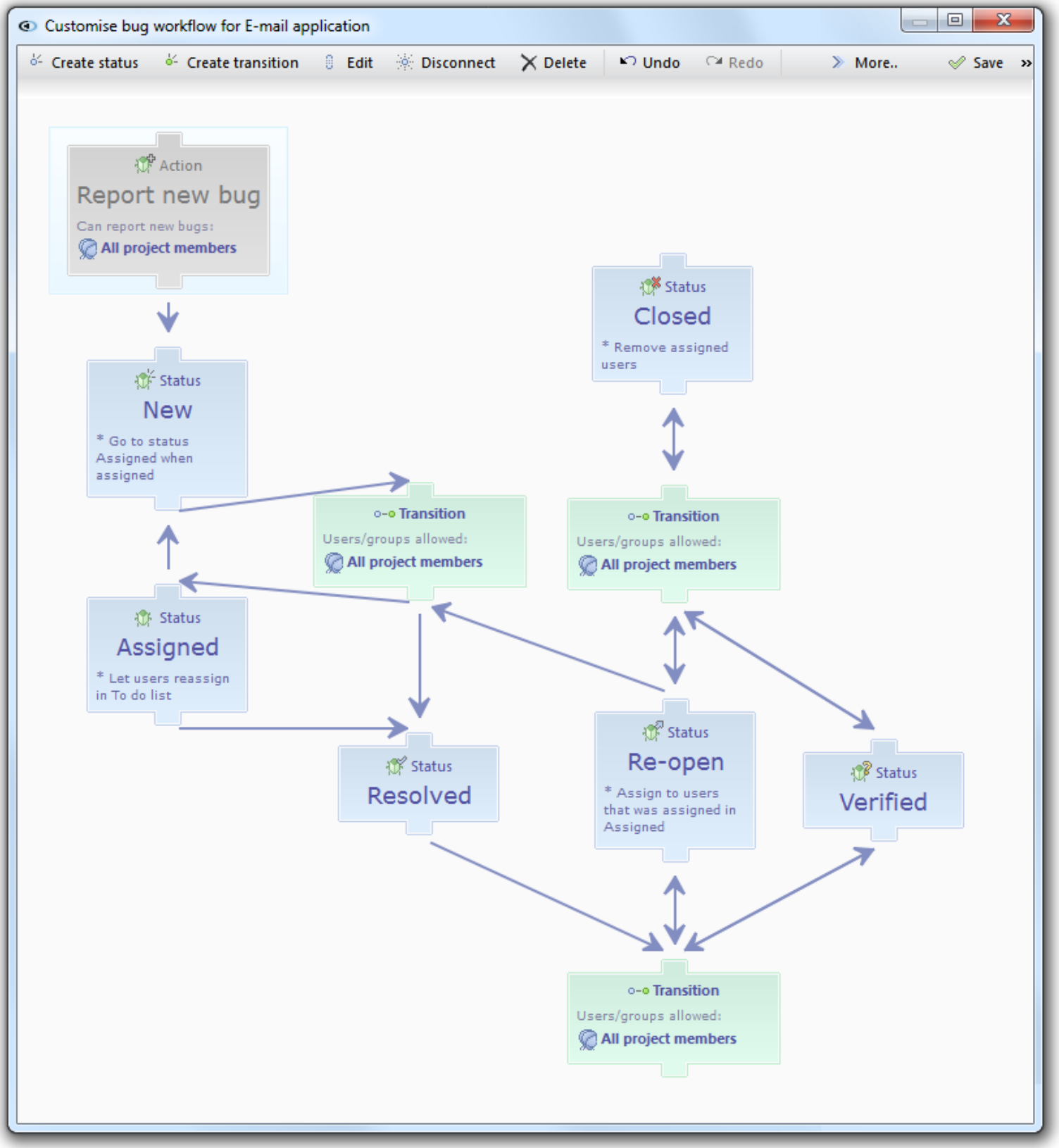
·Forcing users to enter bug status before progressing in the workflow

·Notifications to users/groups when a bug reaches a status (for example, user group "Project managers" should receive an E-mail when a bug reaches status "Closed")

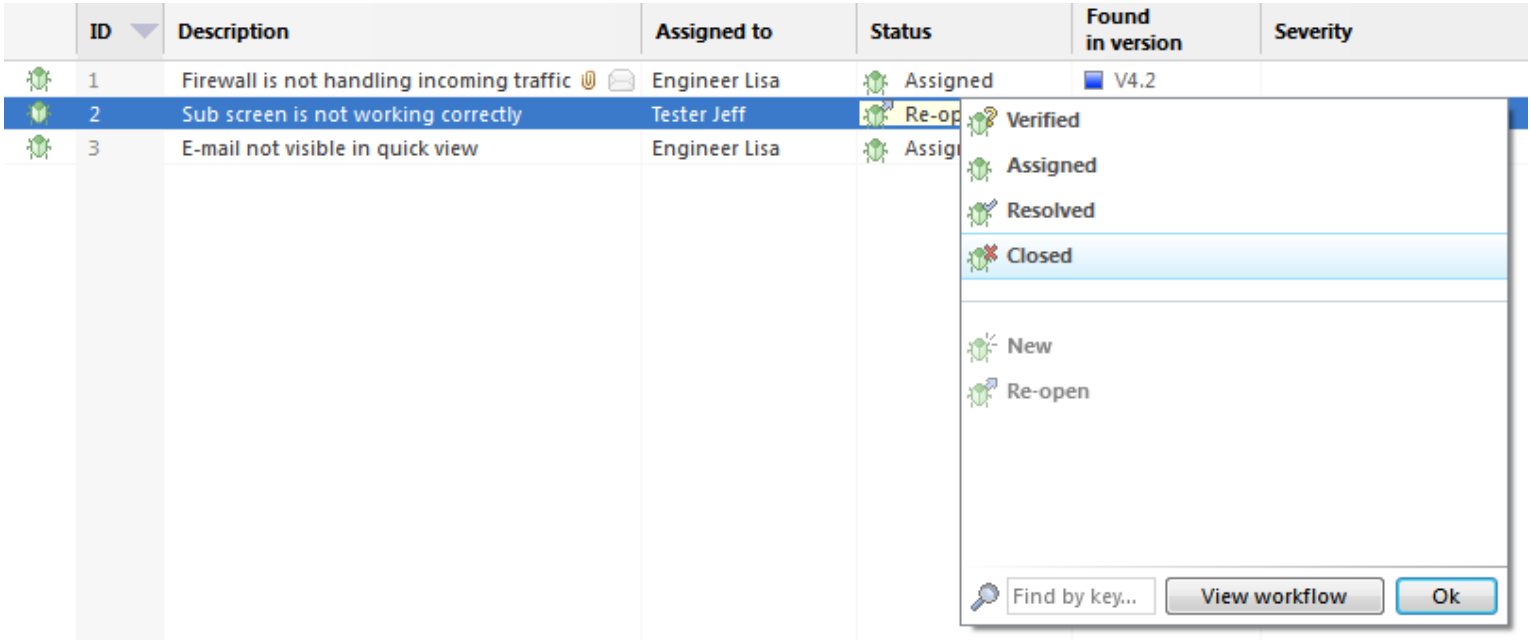
To view the bug workflow, go to **More..>Customize bug workflow...**.



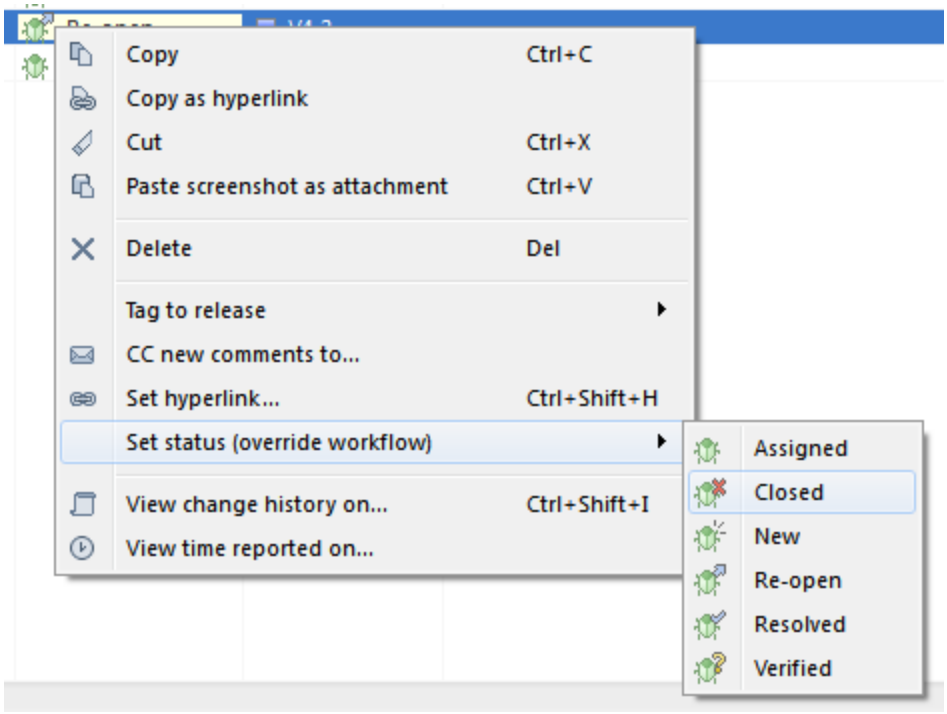
Now you will be presented to the bug workflow of this project. In every blue box, you can see the statuses that a bug can have, and the green boxes limit those who (as in users) can proceed from one bug status to another (to customize the workflow, click here):


Customise bug workflow for E-mail application
Create status
Create transition
Edit
Disconnect
Delete
Undo
Redo
More..
Save
Action
Report new bug
Can report new bugs:
All project members
Status
New
* Go to status Assigned when assigned
Status
Closed
* Remove assigned users
Transition
Users/groups allowed:
All project members
Transition
Users/groups allowed:
All project members
Status
Assigned
* Let users reassign in To do list
Status
Resolved
Status
Re-open
* Assign to users that was assigned in Assigned
Status
Verified
Transition
Users/groups allowed:
All project members

To proceed with the bug workflow, users click on the bug status in the bug list or in the bug details window. Note that only "Main project managers" can override the workflow:



Main project managers can also override the bug workflow by right clicking on a set of bugs and selecting **Set bug status** (override workflow):



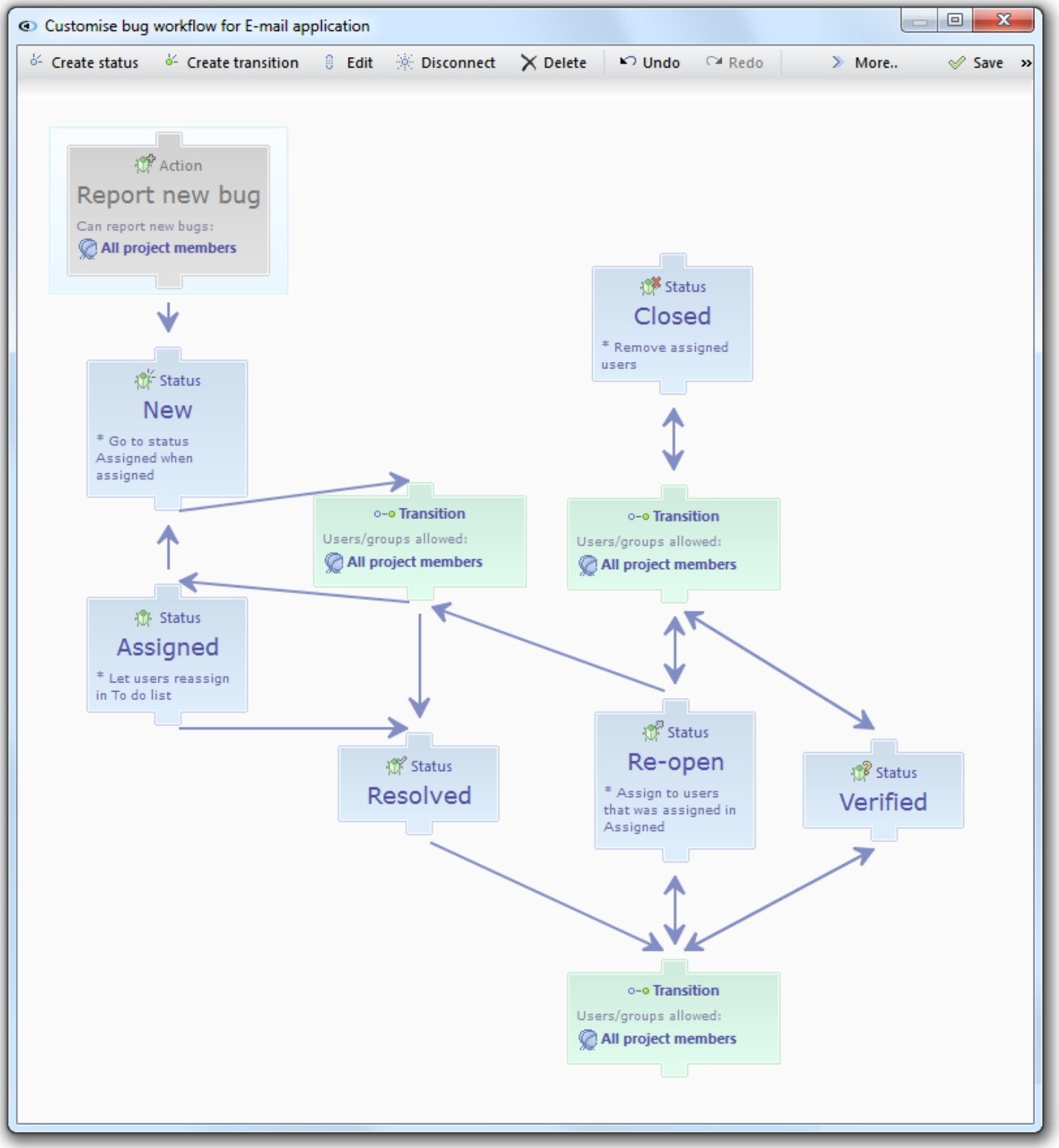
Customising bug workflow

Changing the bug workflow

To customize the workflow in Hansoft you either have to be a "Main project manager" or you need to have the project profile setting "Can edit all bugs" under Administration:

You customize the bug workflow by creating new bug statuses and transitions (limiting those who can go from one bug status to another) and then connecting them with arrows. Changing the bug workflow will have an instant effect on the project. The number of combinations and types of workflows you can create is not limited in any way. Much functionality in the bug workflow and in Hansoft QA in general is embedded in the bug status.

If you would like to reset the workflow back to the Hansoft original, click on "Default workflow" on the tool-bar.


Customise bug workflow for E-mail application
Create status
Create transition
Edit
Disconnect
Delete
Undo
Redo
More..
Save
Action
Report new bug
Can report new bugs:
All project members
Status
New
* Go to status Assigned when assigned
Status
Closed
* Remove assigned users
Transition
Users/groups allowed:
All project members
Transition
Users/groups allowed:
All project members
Status
Assigned
* Let users reassign in To do list
Status
Resolved
Status
Re-open
* Assign to users that was assigned in Assigned
Status
Verified
Transition
Users/groups allowed:
All project members

Creating and editing a bug status

Creating and editing a bug status in Hansoft is fundamental to controlling the bug workflow.

Through the bug status you can:

·Change the visual appearance by changing icons

·When a bug reaches this status, you can auto-assign the bug to individual users or user groups (for example, by assigning the bug to user groups "QA Testers" when it reaches bug status "Resolved"). You can also chose to auto-assign to the Original Reporter directly.

·Give an extra E-mail notification to individual users or a user groups (for example, by notifying user group "Project managers" when the bug reaches the status "Closed")

·Go to another bug status when a bug is assigned to someone (for example, by going from "New" to "Assigned")

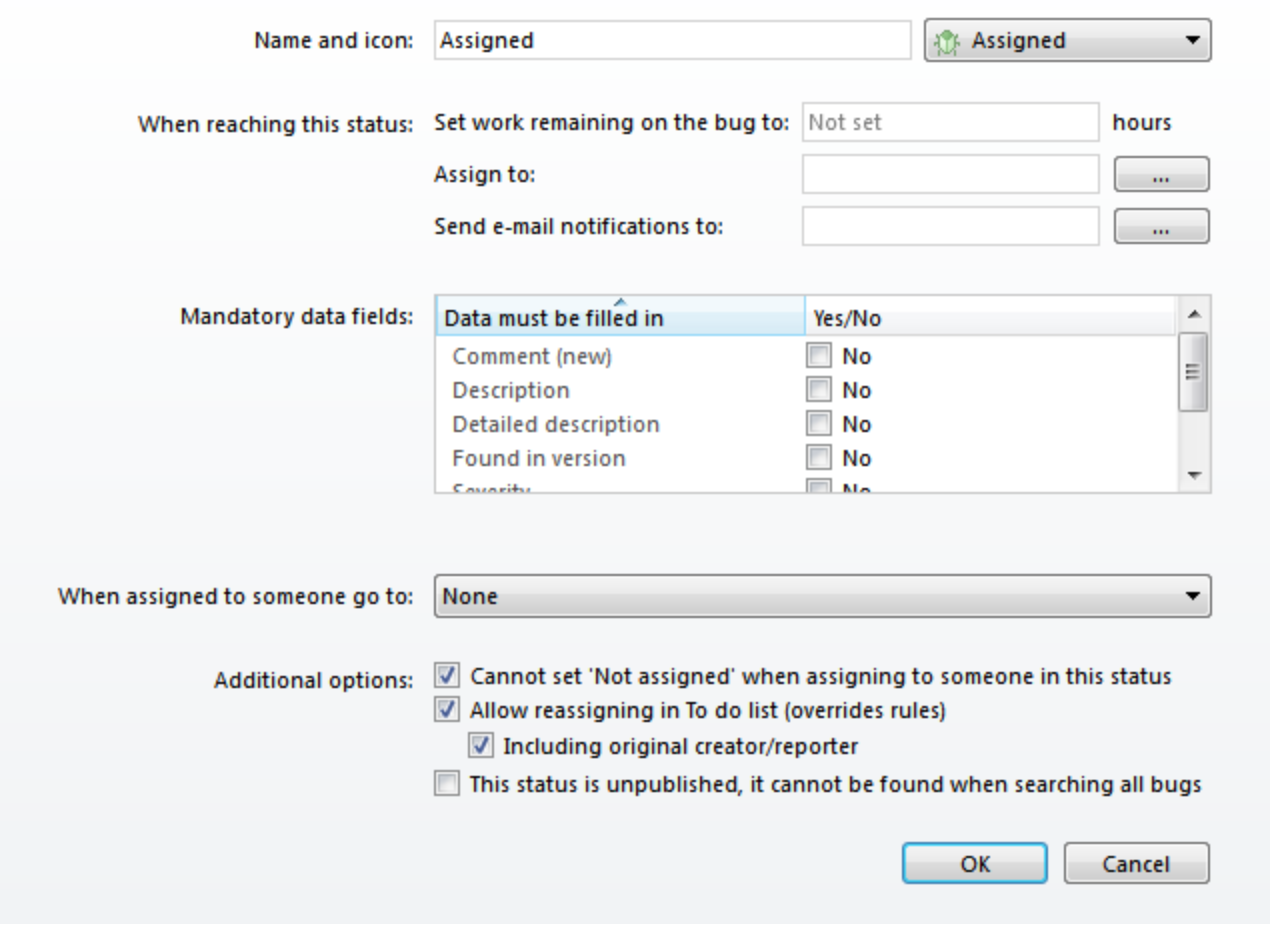
·Set that users can reassign bugs to someone else in their To do list (including the Original Reporter of the bug)

·Remove users from bugs when they reach a bug status (for example, by removing the assignment from the bug when it reaches the status "Resolved" or "Closed")

·Force bug reporters to enter bug data before going to the next bug status (for example, a new comment since last workflow change or by entering "Steps to reproduce" before setting a user or the next bug status)

·Set a flag so Not assigned cannot be set when the bug is in this status

·Set the bug status to "Unpublished", so it is not visible in "All bugs in this project" (but visible to the reporter in "Bugs reported by me")

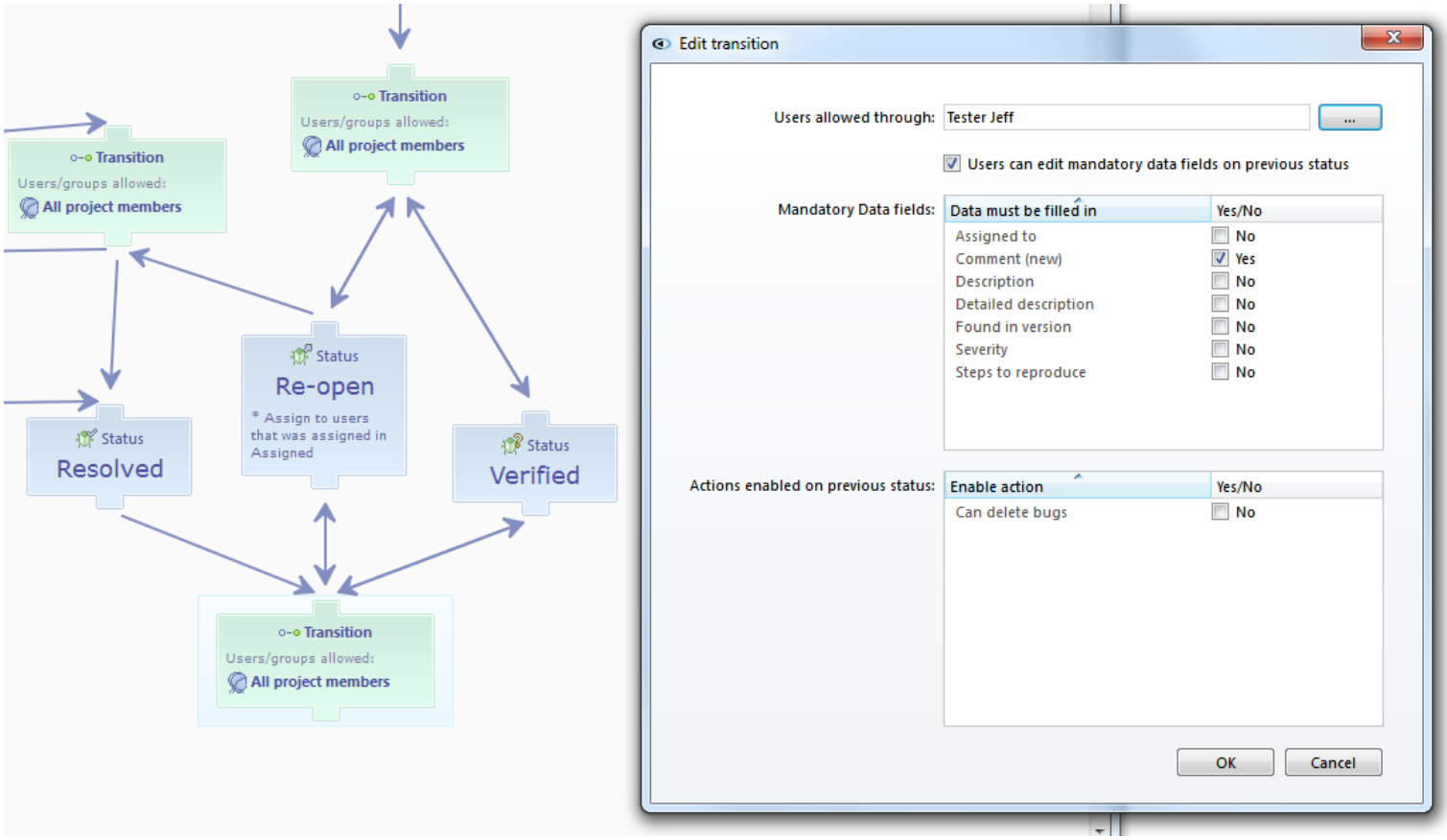


Transitions (going from one bug status to another)

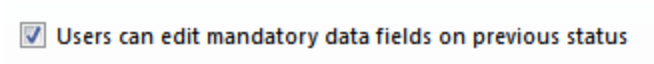
Limiting the users that can go from one bug status to another and other such limitations are handled through bug workflow transitions.

Example

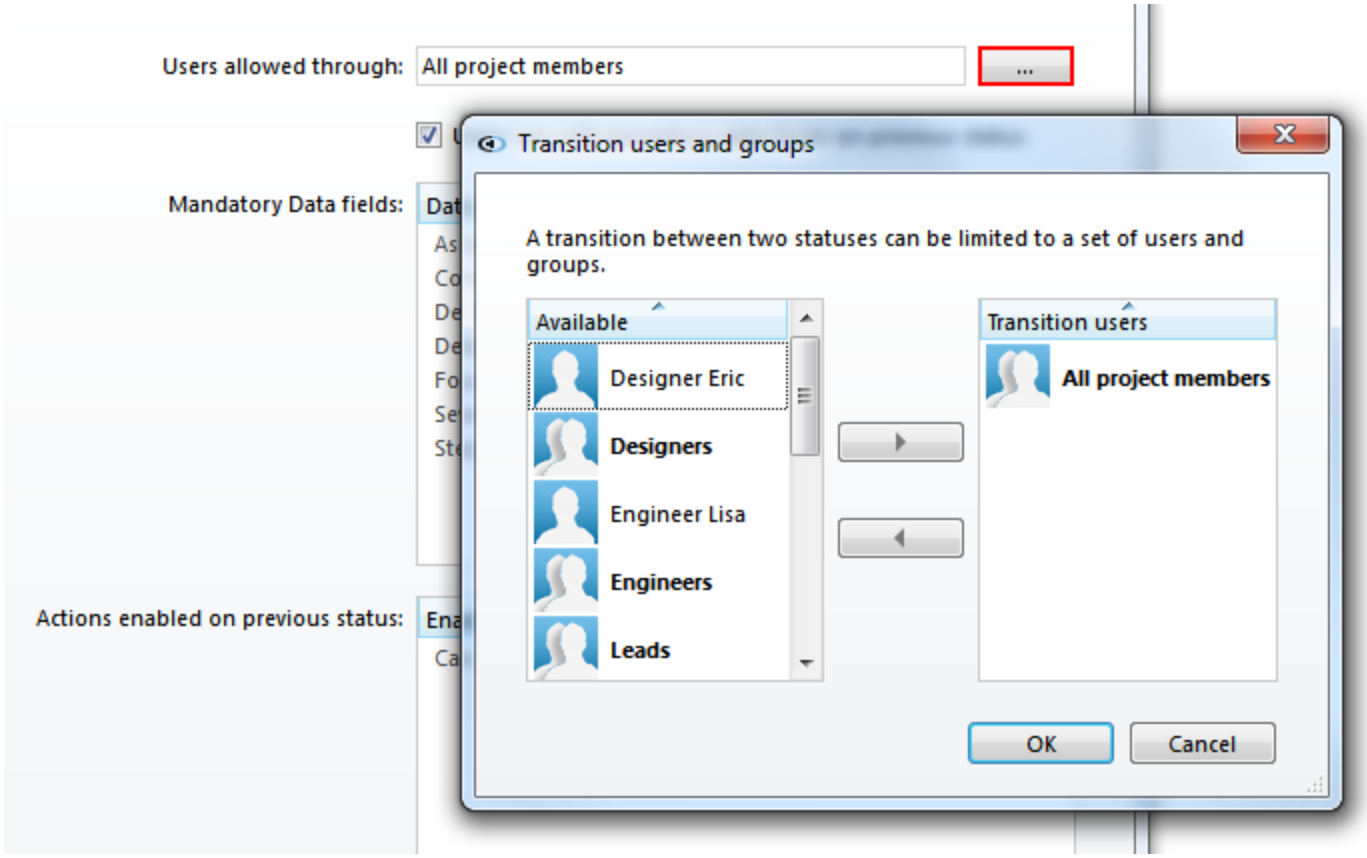
One workflow can look like this where the bug is assigned and when it is resolved, the developer sets the bug status to "Resolved". When the bug is "Resolved", it is auto-assigned to the members of user group "QA Testers". Proceeding from "Resolved" to "Verified" can only be done by the members of "QA Testers" in this case. Also, the "Comments" field must be filled in before progressing to "Verified".



One advanced and important setting on a transition is to be able to edit certain fields within a bug, when it is in a specific state. For example, QA testers cannot normally edit the "Bug status" field, but when the bug is in the state "Resolved", they are the ones that can edit this field.

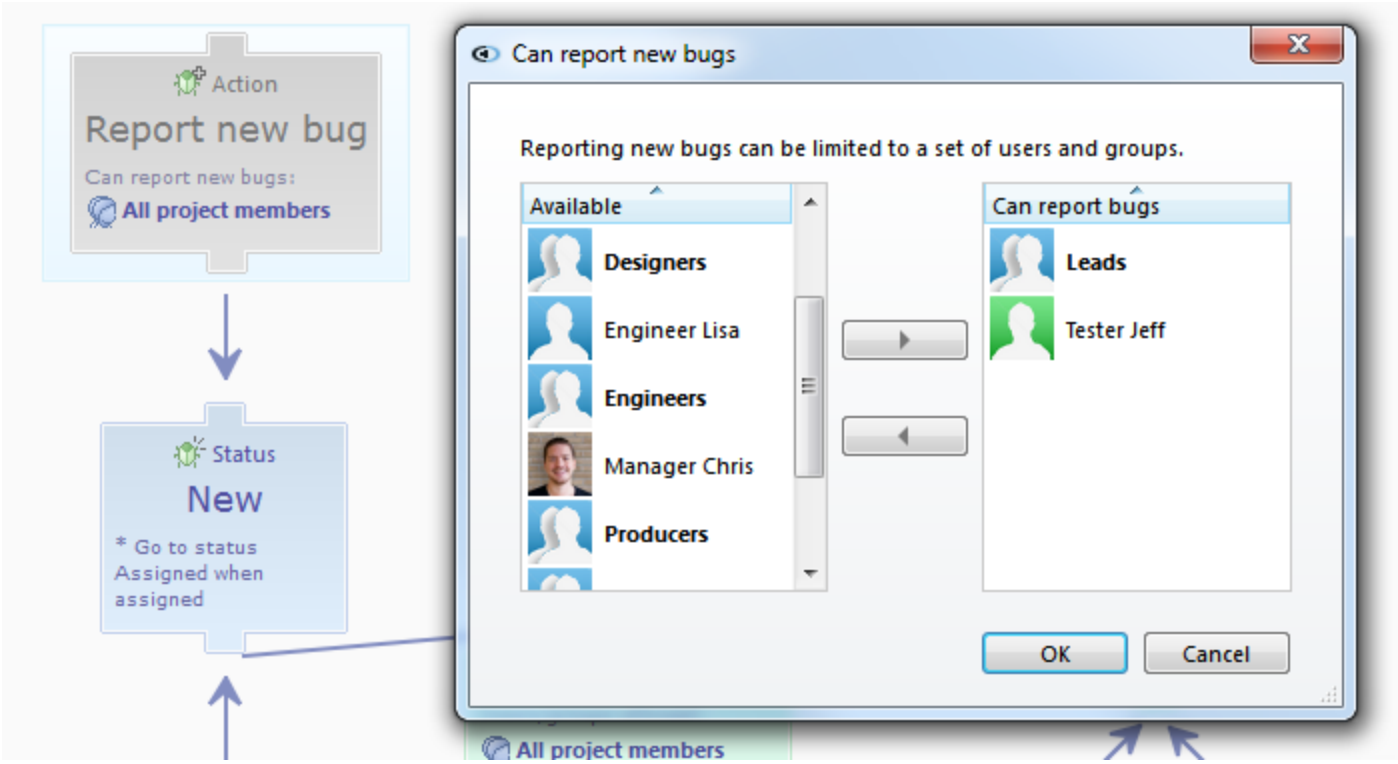


To change which users and user groups can make a transition from one bug status to another, click the **Users allowed through** button:



Limiting who can report bugs

You can limit who can report bugs by double clicking, or by selecting **Edit**, the gray "Report new bug" box in the bug workflow. You can then decide who can report new bugs by selecting individual users or user groups:

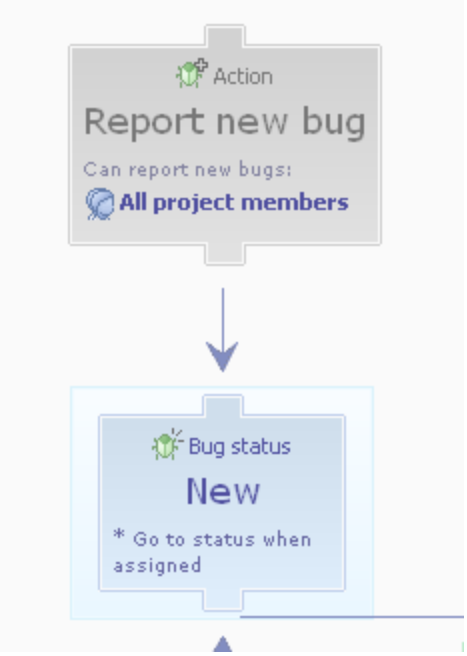


Forcing bug reporters to enter bug data on a bug status

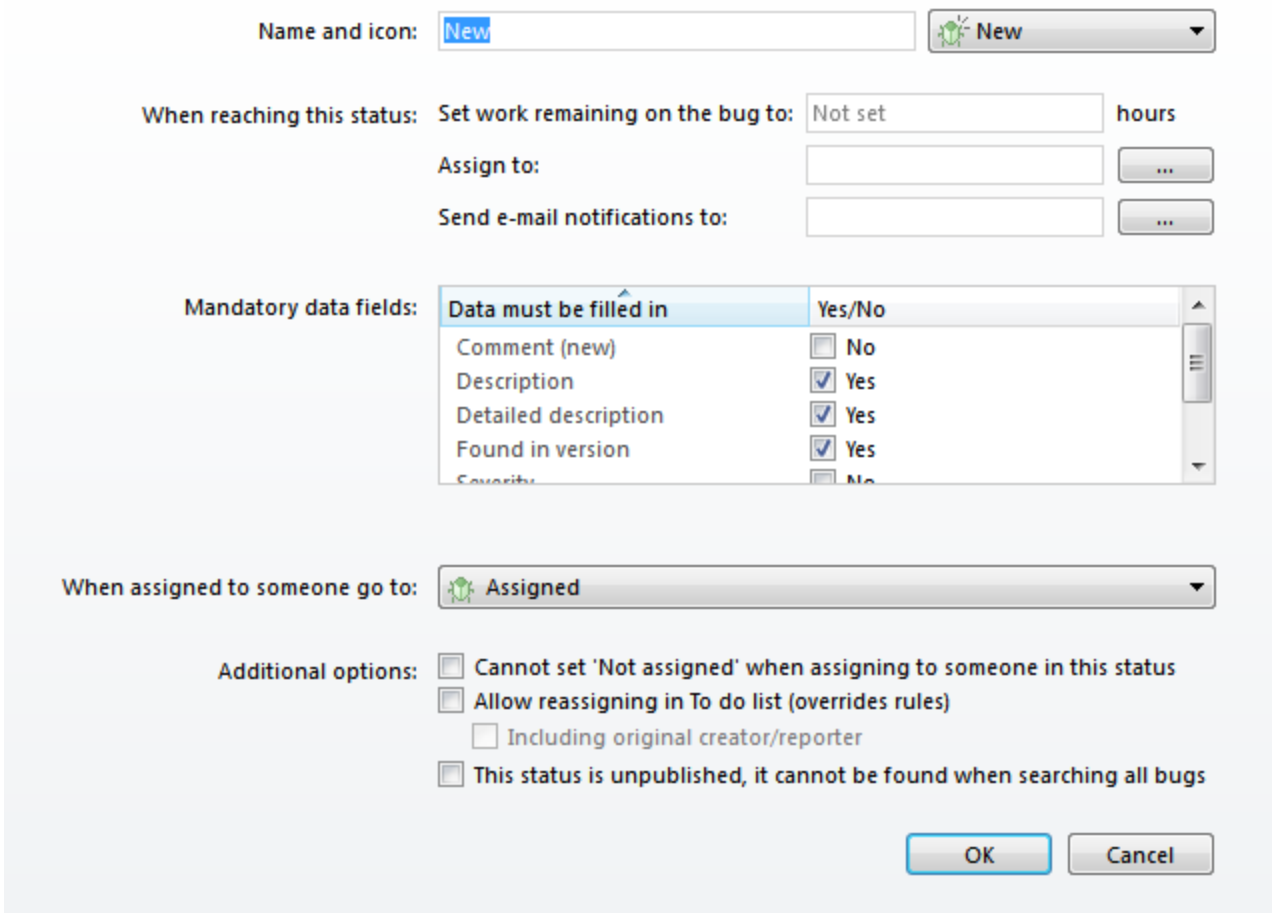
Forcing bug reporters to enter certain bug data on a newly reported bug before setting a user or proceeding in the workflow is often a fundamental part of the workflow in QA.

You can force data to be entered when going from one bug status to another by using a transition.

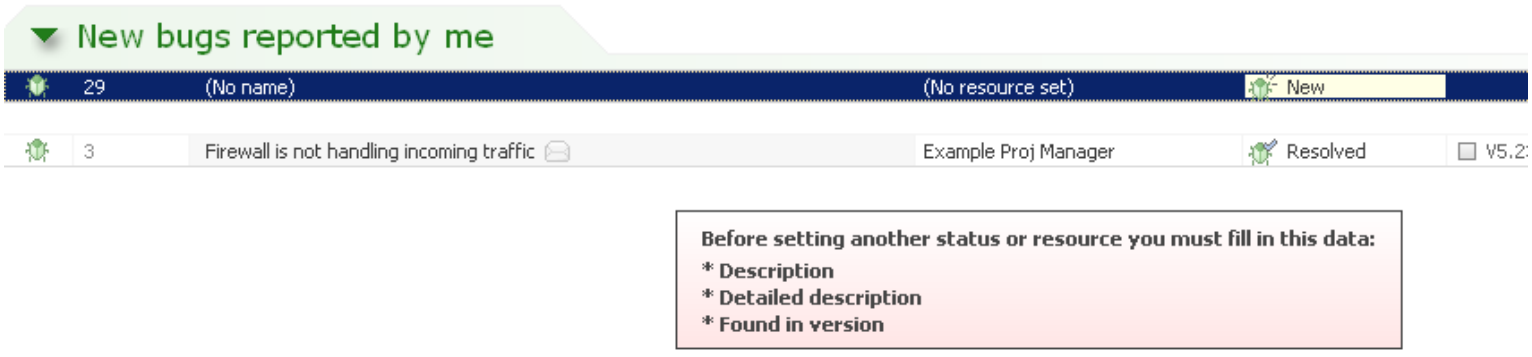
It is recommended that you set the "force bug data to be entered" on the first bug status in the workflow, in this case status "New":

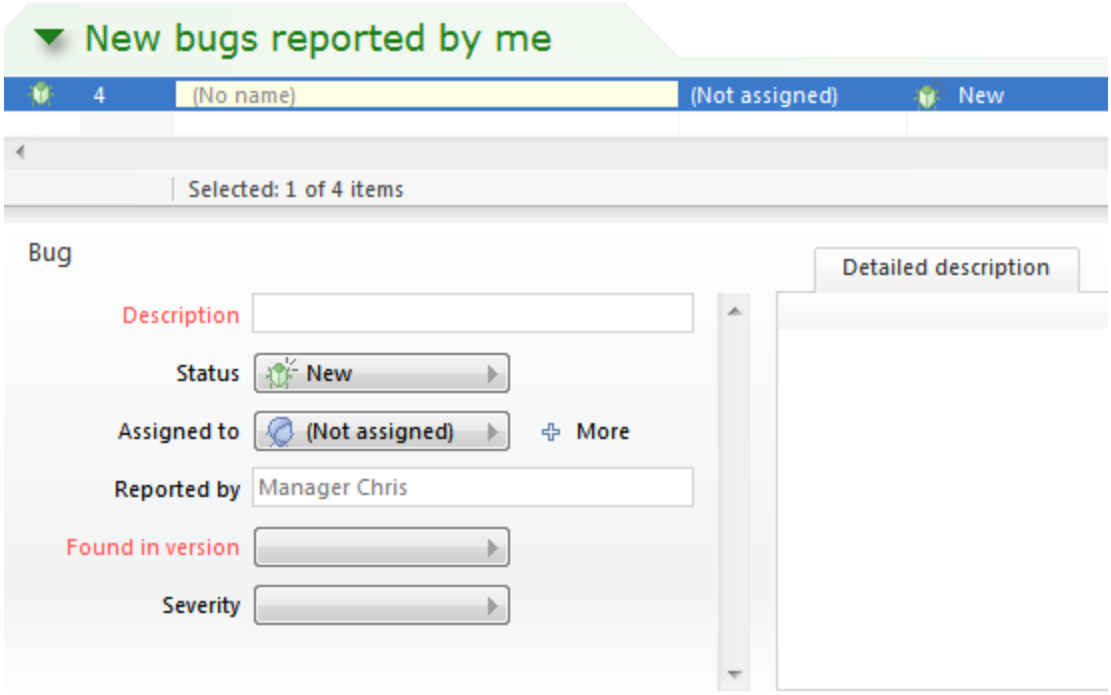


Edit the bug status and select bug data that must be filled in before setting a user or another bug status. In this case, we have set "Description", "Detailed description" and "Found in version":



When users try to set another user or bug status they will get this message (as an example):

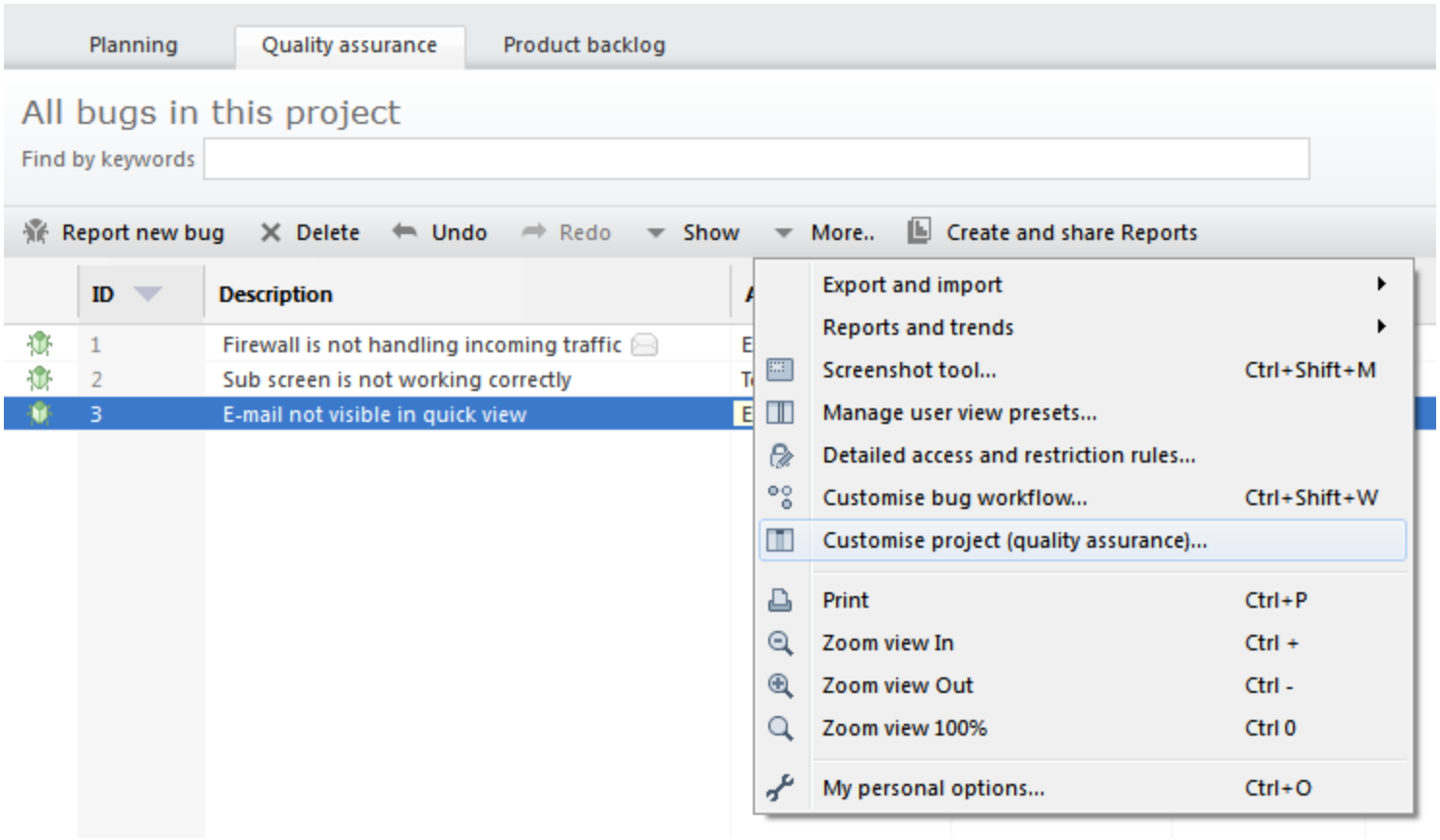




Adding extra columns

Adding extra columns is a fundamental part of customizing QA to fit your needs. You have to be a "Main project manager" to do this.

Go to the **More..>Customize project (quality assurance)...**.



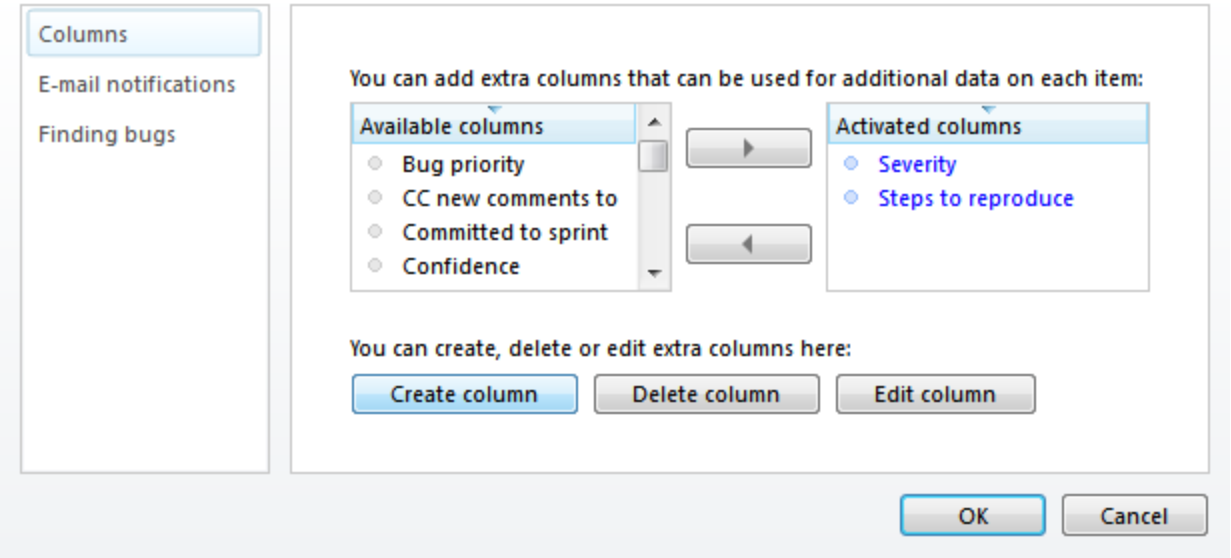
Accessing the Customize project dialog for QA

Here you will be presented both with pre-defined columns such as "Last commented on" as well as the possibility to create your own custom column such as "Found in version".

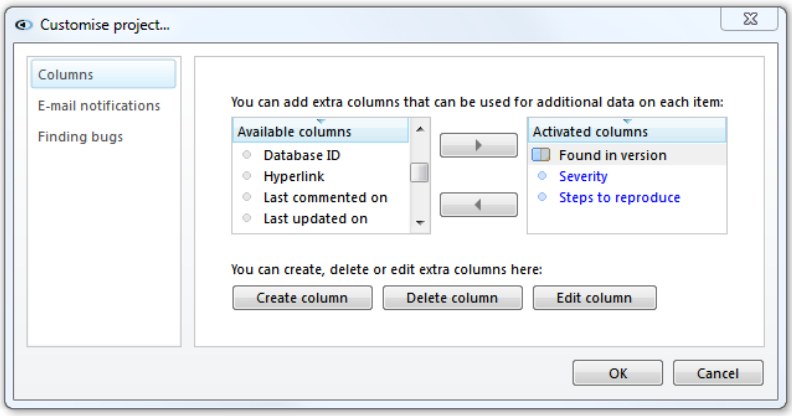
The pre-defined columns are:

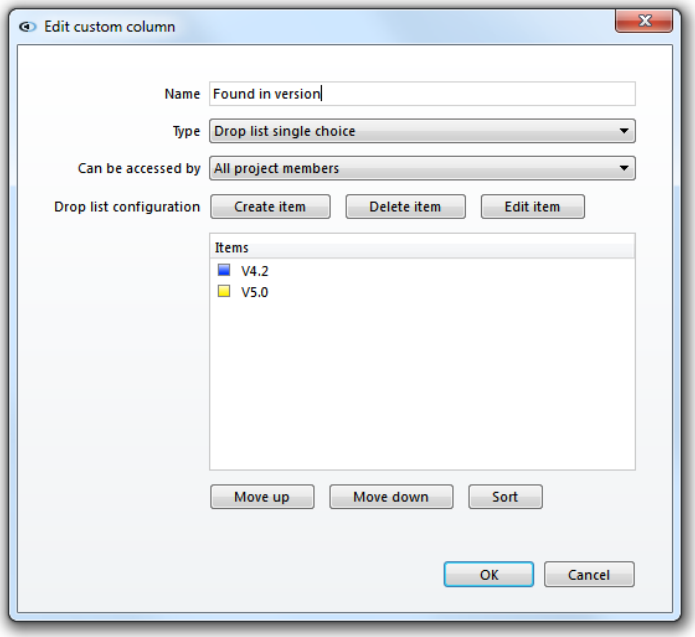
·Last commented on (time when the last comment was made)
·Last updated on (time when the bug was last updated)
·Linked to task/item/bug (linked to another task or bug in any project)
·Originally reported by (who was the original reporter)
·Severity (severity for this bug)
·Complexity points (an agile metric that describes the complexity of performing the task)
·Confidence (how confident a user about solving the bug)
·Hyperlink (link to something outside Hansoft)
·Priority (Priority of the bug)
·Release tag (Linked to a scheduled release/release)

·Risk

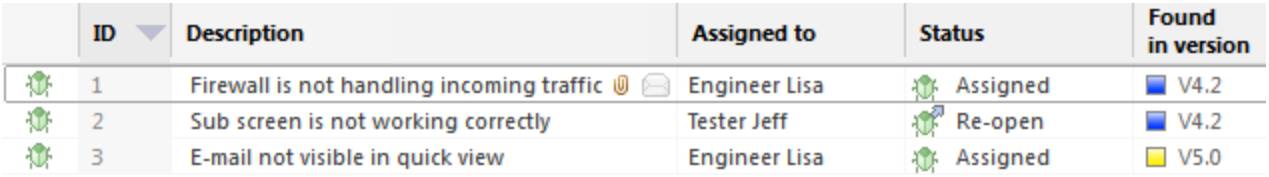


To create your own column, click on **Create column**. For example, a very common column to create is "Found in version". Select type "Drop list" and create an item for each version:





Now, "Found in version" will be visible in the project columns. You can use the find function to see how many bugs that are e.g "Found in version" 4.1.



	ID	Description	Assigned to	Status	Found in version
	1	Firewall is not handling incoming traffic	Engineer Lisa	Assigned	V4.2
	2	Sub screen is not working correctly	Tester Jeff	Re-open	V4.2
	3	E-mail not visible in quick view	Engineer Lisa	Assigned	V5.0

Detailed access and restriction rules

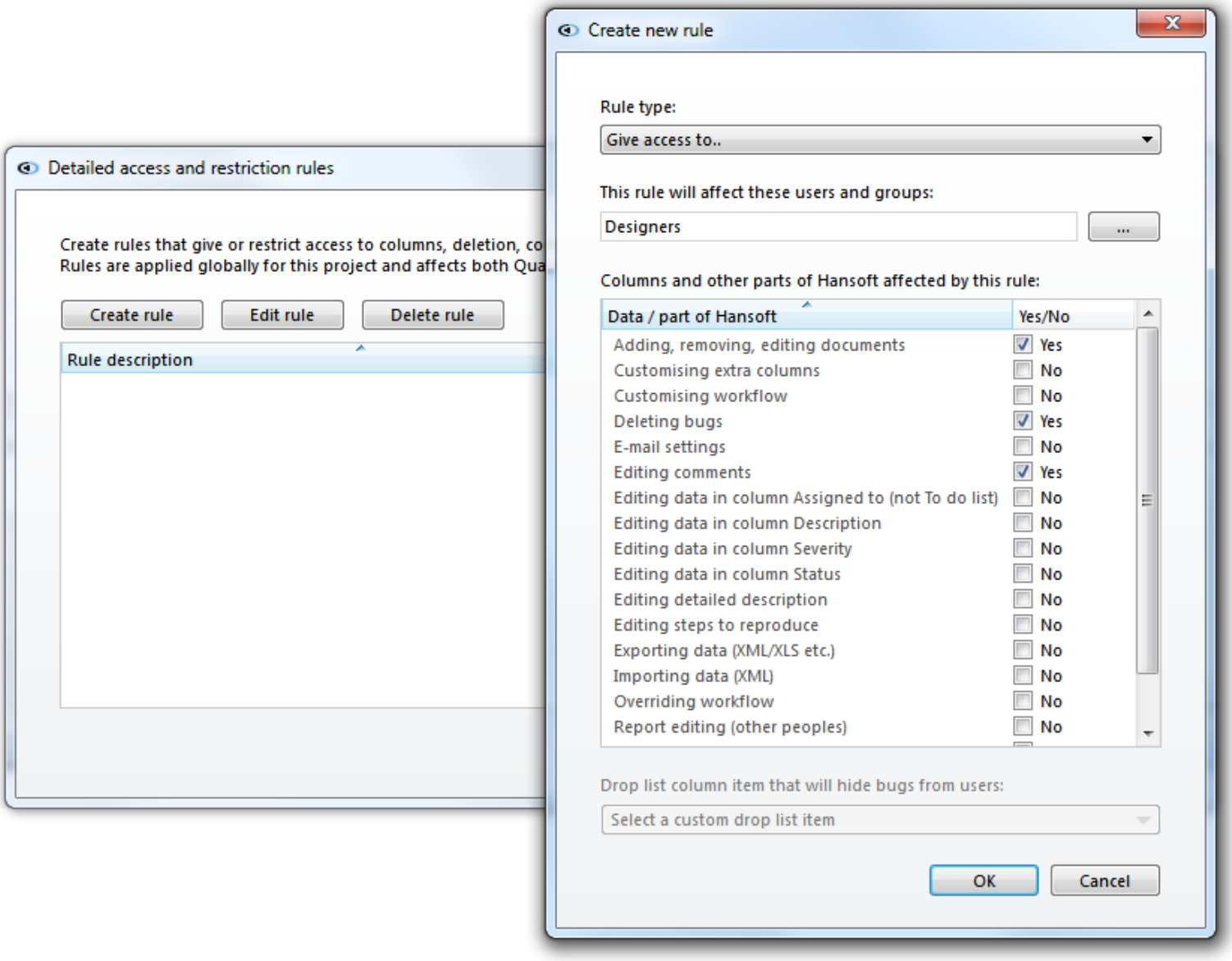
Hansoft offers extensive functionality in giving and restricting access to bug column data and other parts (like deleting bugs, importing XML, documents or customizing the workflow and more).

Bugs can be hidden for a specific user or user group when a bug has a certain custom column item selected (for example custom column Hidden set to drop list item Hidden Yes, hides the bugs from user group "Outsourcing partner").

The rules are global and affects all members (even Main project managers) and all views (Bugs reported by me, All bugs and the To do list).

The only thing that can override a rule is a transition that lets you edit certain fields on the previous bug status and reassigning in the To do list (set on a bug status).

Note: Only Main project managers can change detailed access and restriction rules.

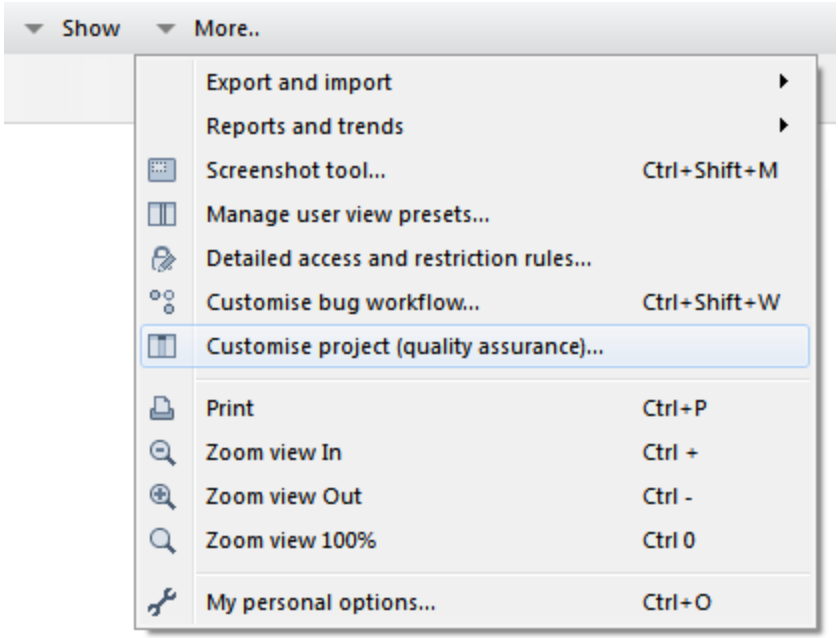

Detailed access and restriction rules
Create rules that give or restrict access to columns, deletion, co
Rules are applied globally for this project and affects both Qua
Create rule
Edit rule
Delete rule
Rule description
Create new rule
Rule type:
Give access to..
This rule will affect these users and groups:
Designers
...
Columns and other parts of Hansoft affected by this rule:
Data / part of Hansoft
Yes/No
Adding, removing, editing documents Yes
Customising extra columns No
Customising workflow No
Deleting bugs Yes
E-mail settings No
Editing comments Yes
Editing data in column Assigned to (not To do list) No
Editing data in column Description No
Editing data in column Severity No
Editing data in column Status No
Editing detailed description No
Editing steps to reproduce No
Exporting data (XML/XLS etc.) No
Importing data (XML) No
Overriding workflow No
Report editing (other peoples) No
Drop list column item that will hide bugs from users:
Select a custom drop list item
OK
Cancel

Creating an access and restriction rule

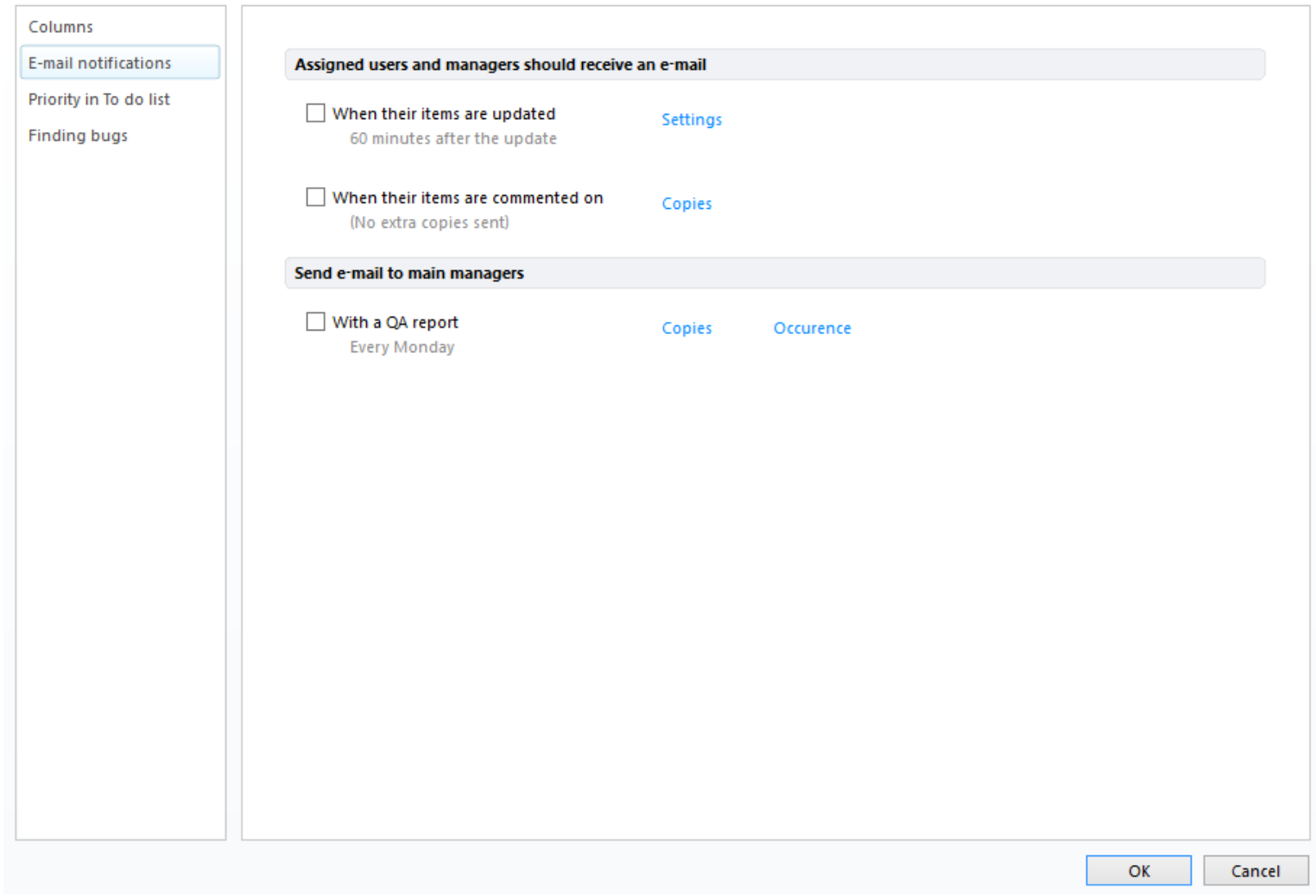
Auto generated E-mails in QA

You can have specific E-mail settings for QA (along with E-mail settings for the project). E-mails are delivered in the HTML format and all references to bugs (or tasks) have hyperlinks that link directly into the Hansoft application.

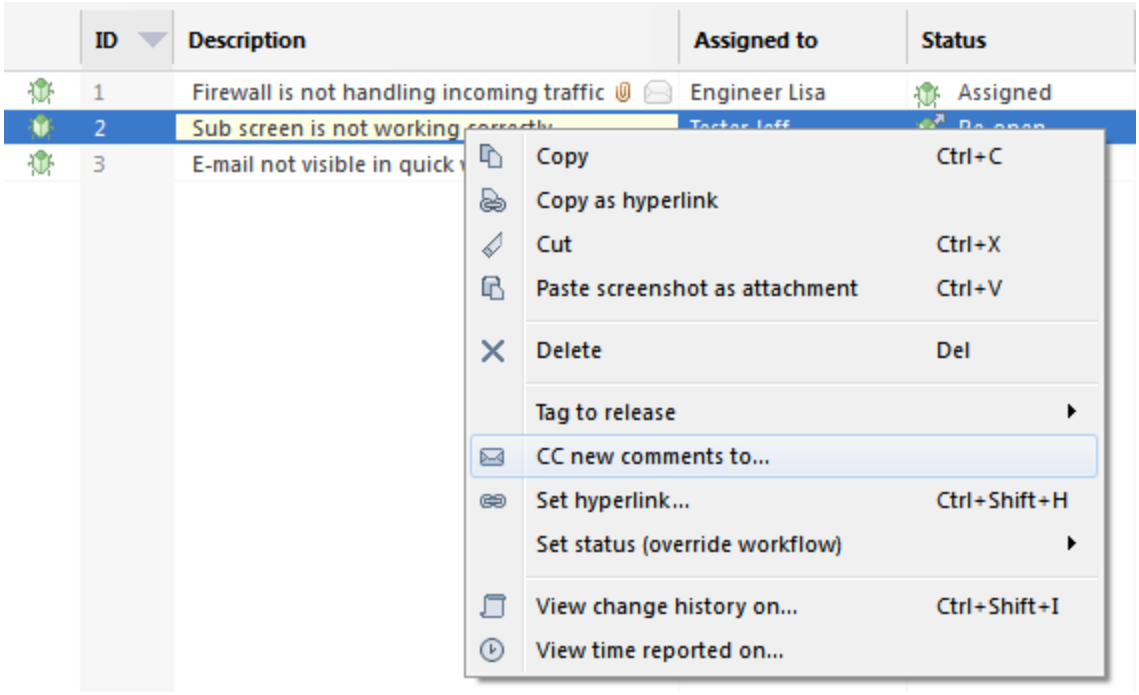
QA E-mail settings are found in the Customize Project (QA) dialog, opened from the **More..** menu.



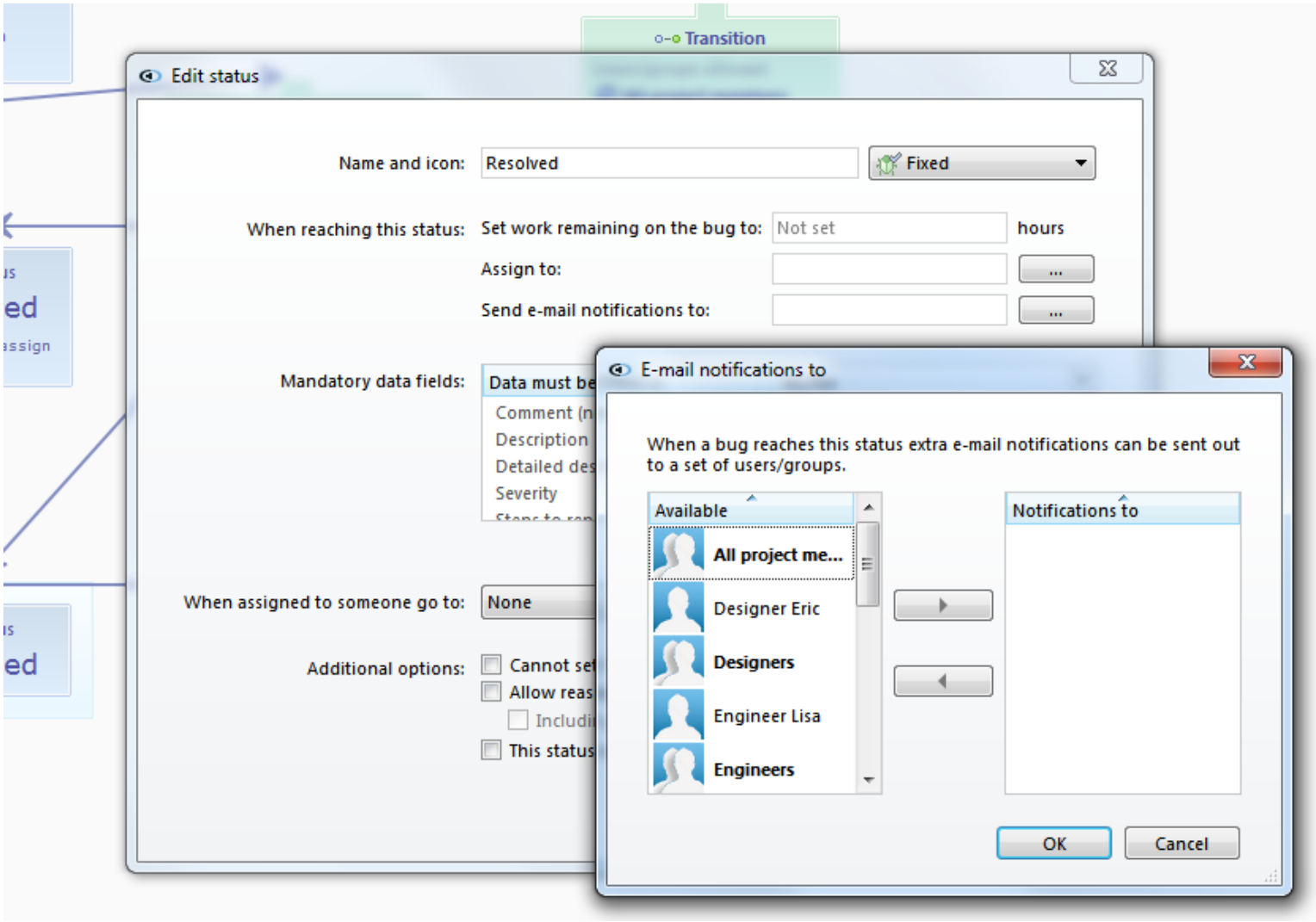
Here you can switch different parts of auto-generated E-mails both on and off:



In addition to this, you can CC new comment posts to individuals or user groups:

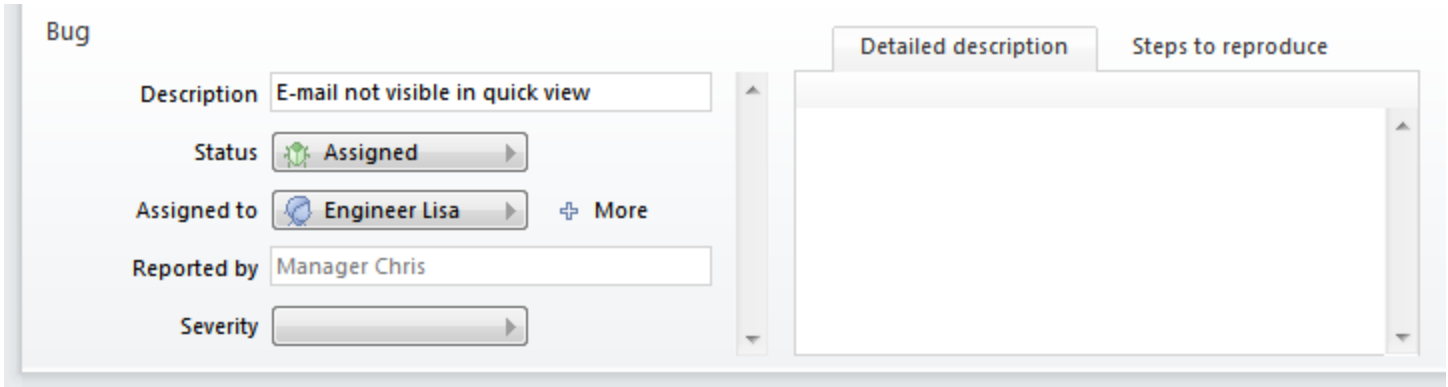


As shown in an previous chapter, you can also notify individuals or user groups when a bug reaches a specific status (here the user group "Project managers" is notified when a bug reaches status "Closed"):

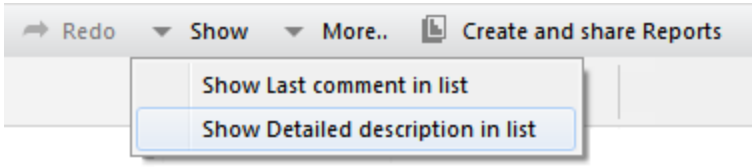


Detailed description and Steps to reproduce

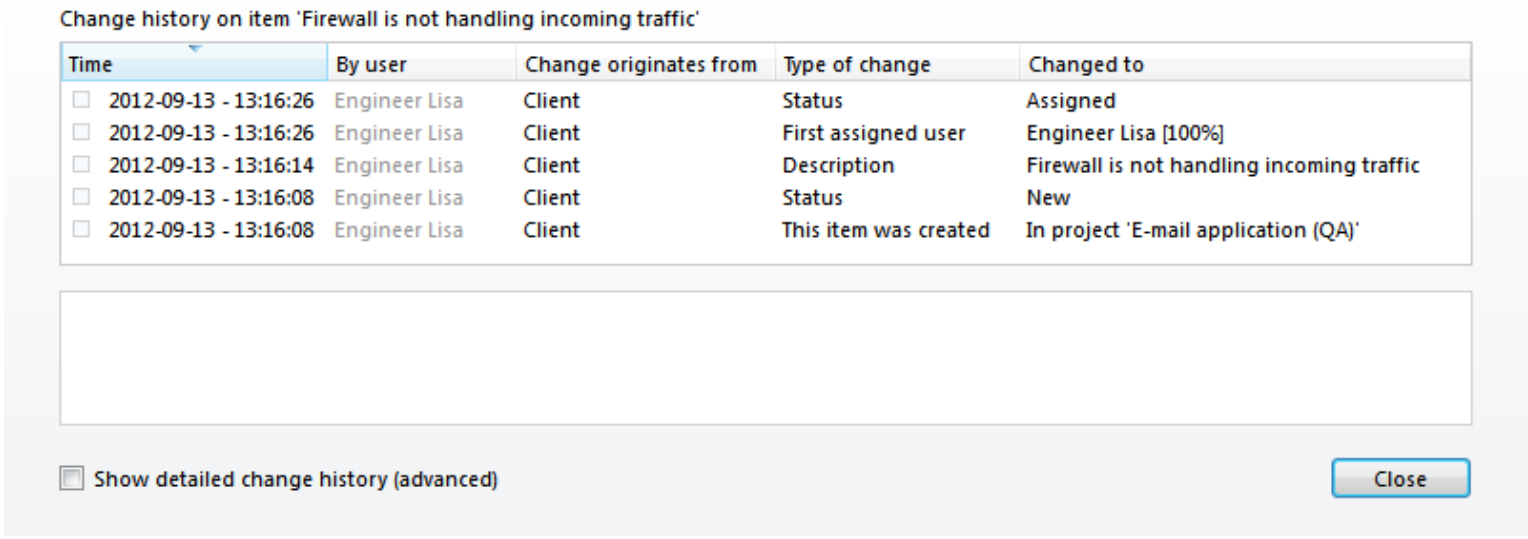
For each bug you have a Detailed description and Steps to reproduce:



You can view in the bug list (and print) and find on detailed description by going to "Show" on the toolbar and then "Show Detailed description in list":



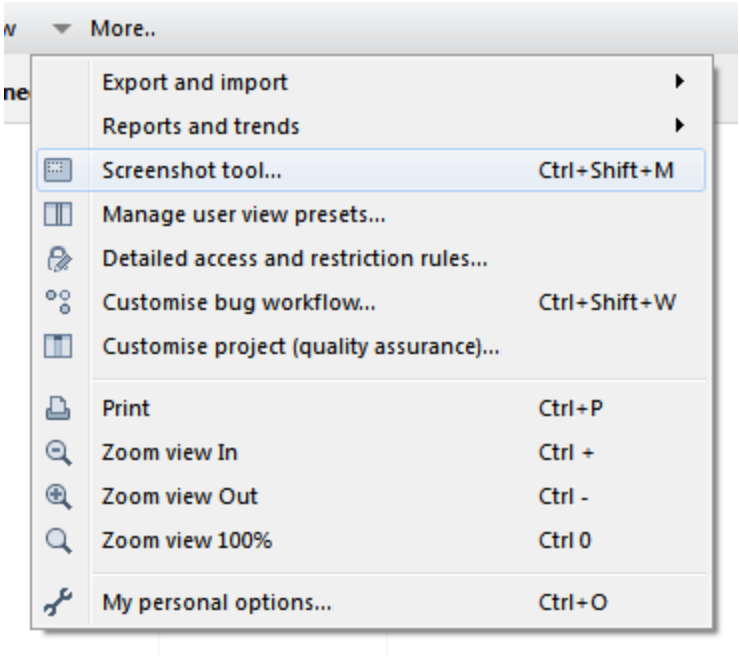
A history of detailed descriptions and steps to reproduce can be found in Detailed bug history (from the context click menu on a bug). Here you can see the full history of these two:


Change history on item 'Firewall is not handling incoming traffic'
Time
By user
Change originates from
Type of change
Changed to
2012-09-13 - 13:16:26 Engineer Lisa Client Status Assigned
2012-09-13 - 13:16:26 Engineer Lisa Client First assigned user Engineer Lisa [100%]
2012-09-13 - 13:16:14 Engineer Lisa Client Description Firewall is not handling incoming traffic
2012-09-13 - 13:16:08 Engineer Lisa Client Status New
2012-09-13 - 13:16:08 Engineer Lisa Client This item was created In project 'E-mail application (QA)'
Show detailed change history (advanced)
Close

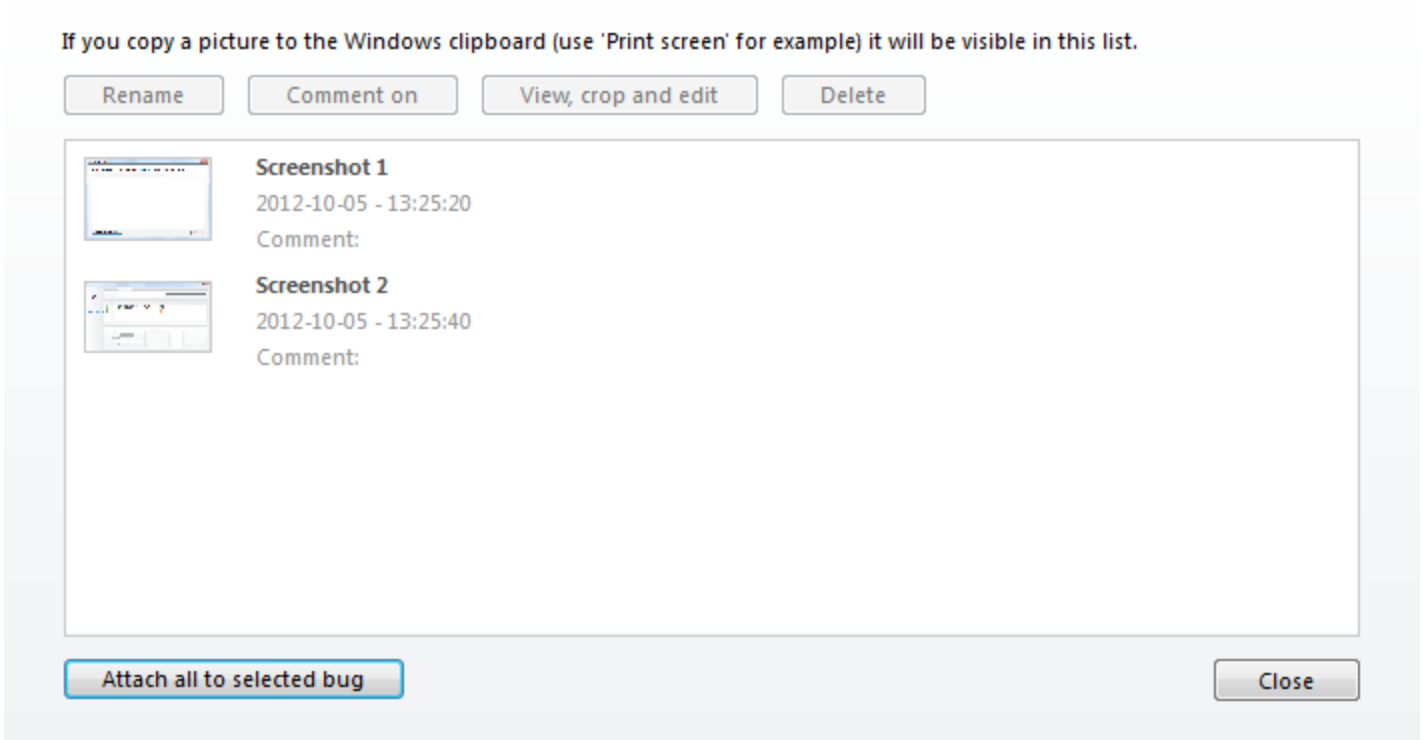
Screenshot tool

The screenshot tool in Hansoft is there to make it easy to capture screenshots and attach them to a bug.

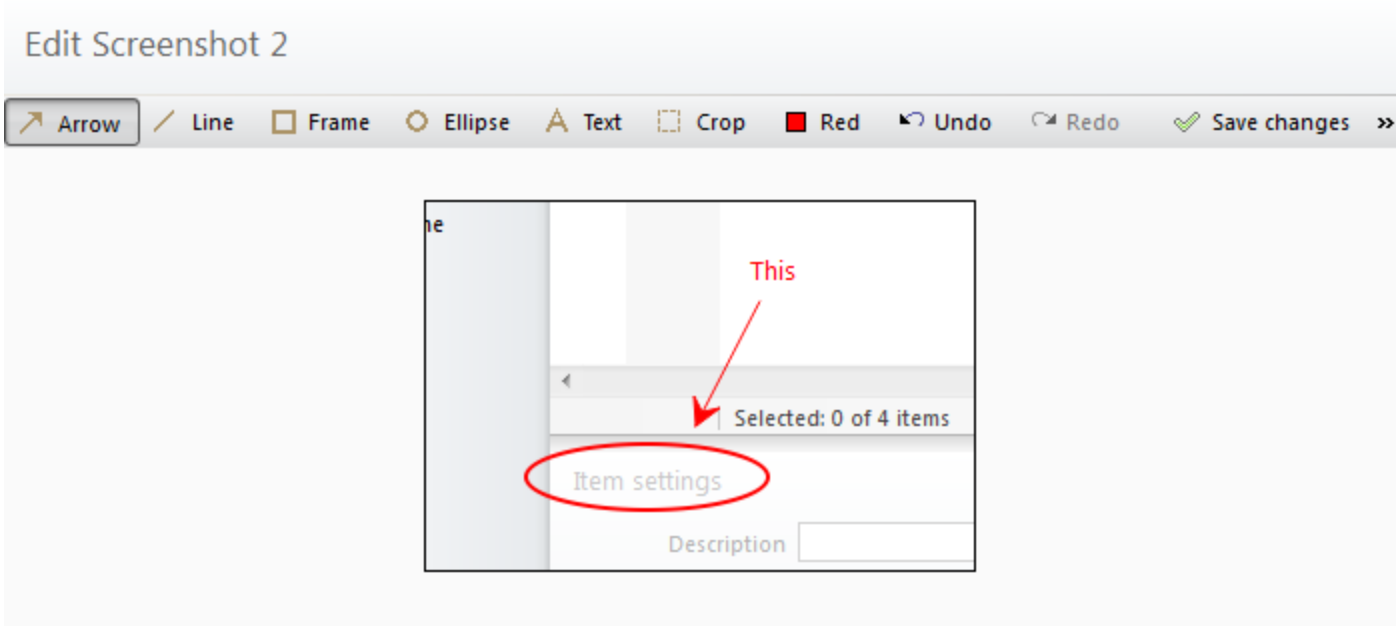
Go to the **More..** menu and select **Screenshot tool** (or press Ctrl + Shift + M (Cmd + Shift + M)):



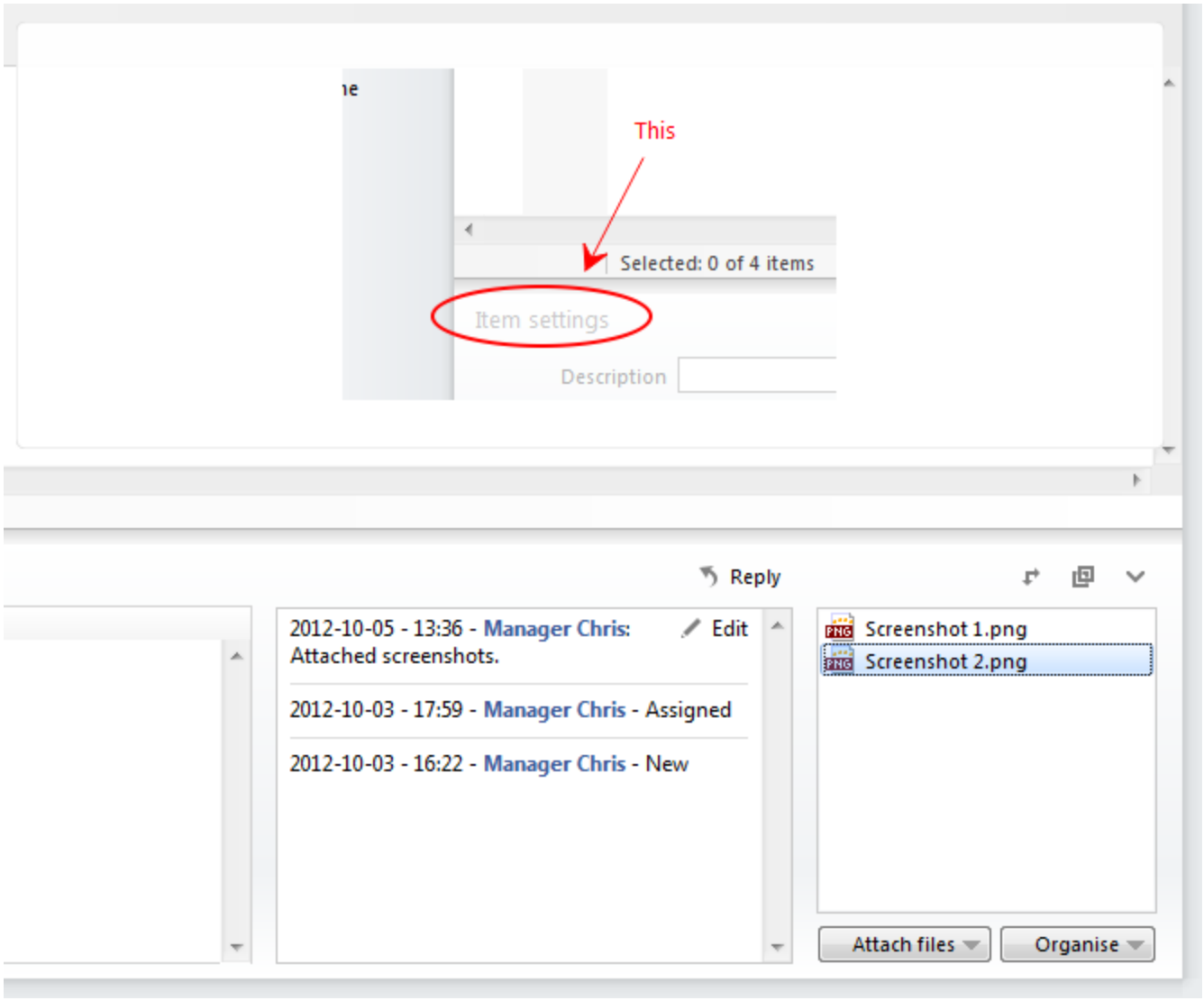
Capture a screenshot by pressing Print screen on your keyboard or by copying a picture into the clipboard:



You can edit the screenshot (lines, ellipses, text and cropping) and then save the changes:

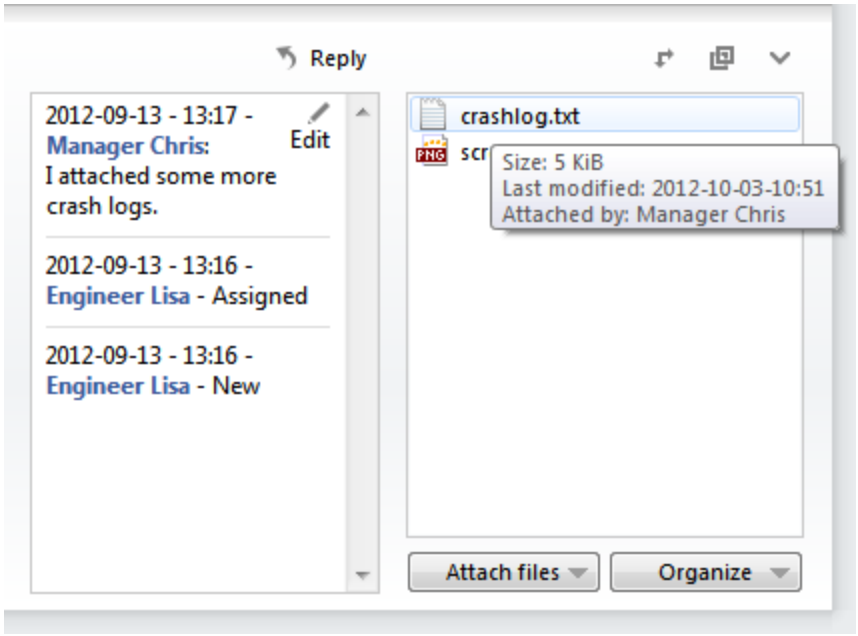


After capturing the screenshots (which will be saved as .png) and attaching them, they will look like this in the bug details window:



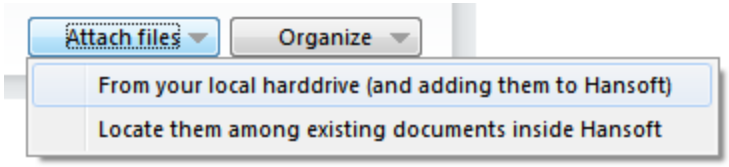
Attaching files to a bug (and auto preview)

To describe a bug more accurately, you might need to attach related files. The rightmost section of the Item detail pane is the Attachments section. It displays a list of files attached to the current bug.



The attachments section

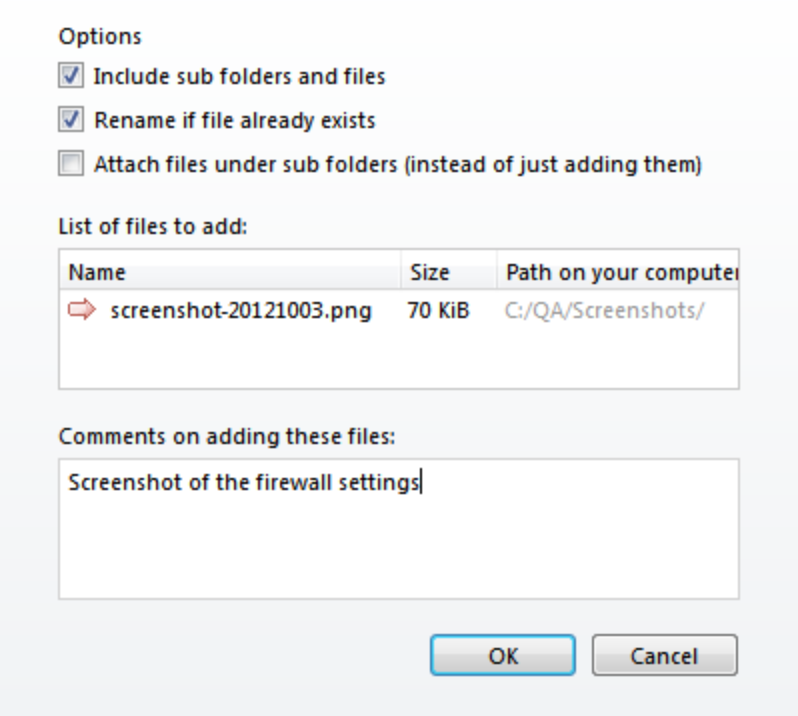
Attaching a file


Attach files
Organize
From your local harddrive (and adding them to Hansoft)
Locate them among existing documents inside Hansoft

The Attach files drop-down menu

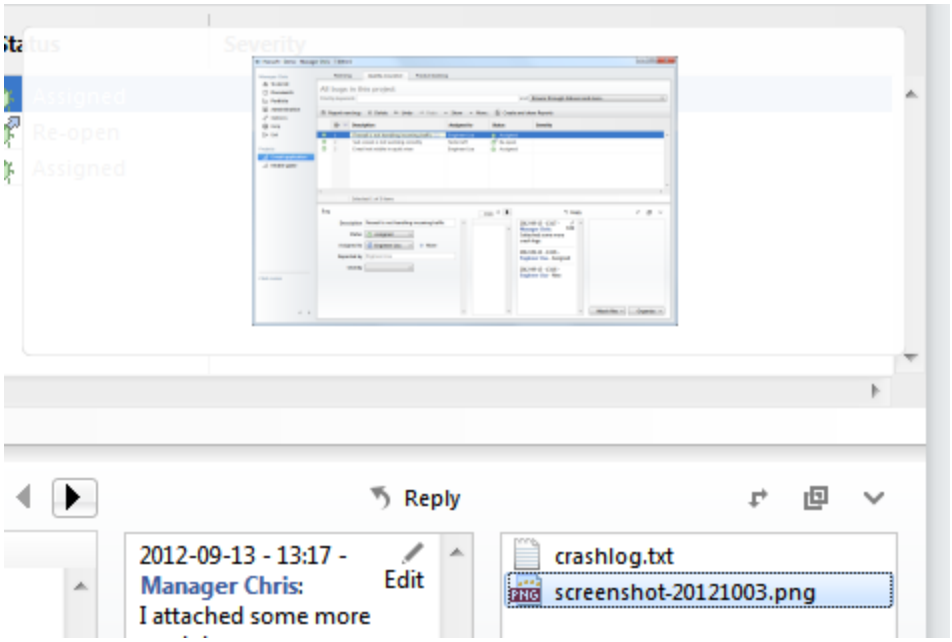
The easiest way to attach a file is to drag-and-drop it into the attachments section. Attachments can also be made by using the Attach files dropdown menu, which contains an option for attaching documents from within Hansoft.

When attaching a file, a dialog will appear, prompting for additional information about the file attached.



The Attach file dialog

Supported image file formats can be automatically previewed in the main view by clicking them. Double-clicking an attachment will open it in the application associated with the file format.



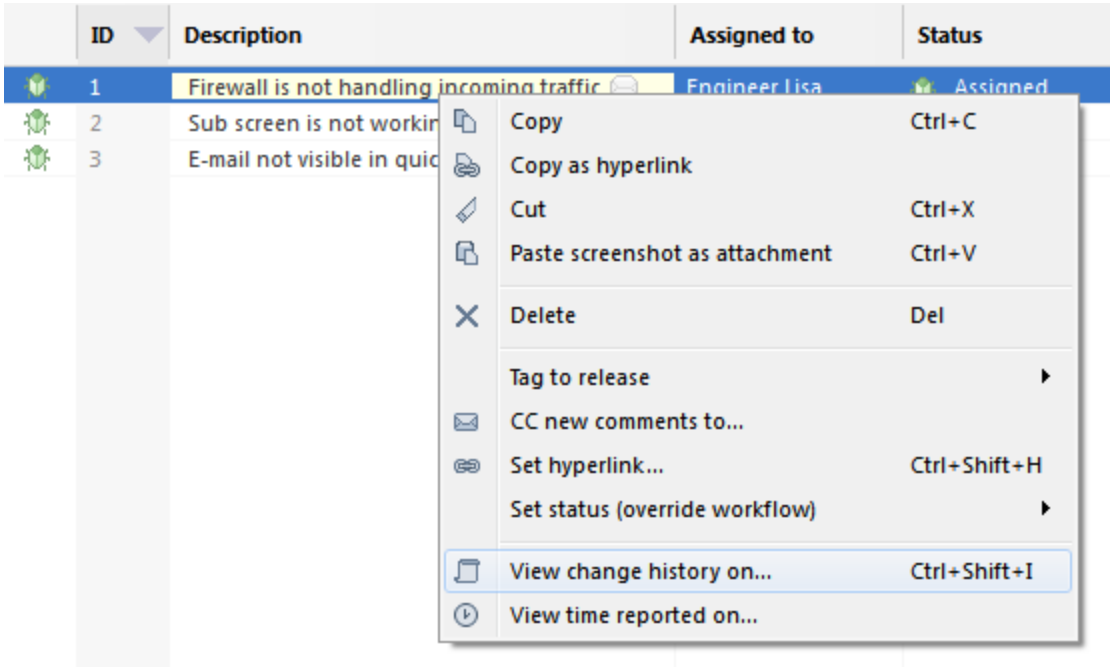
Auto preview can be turned off in My personal options.

Detailed bug history

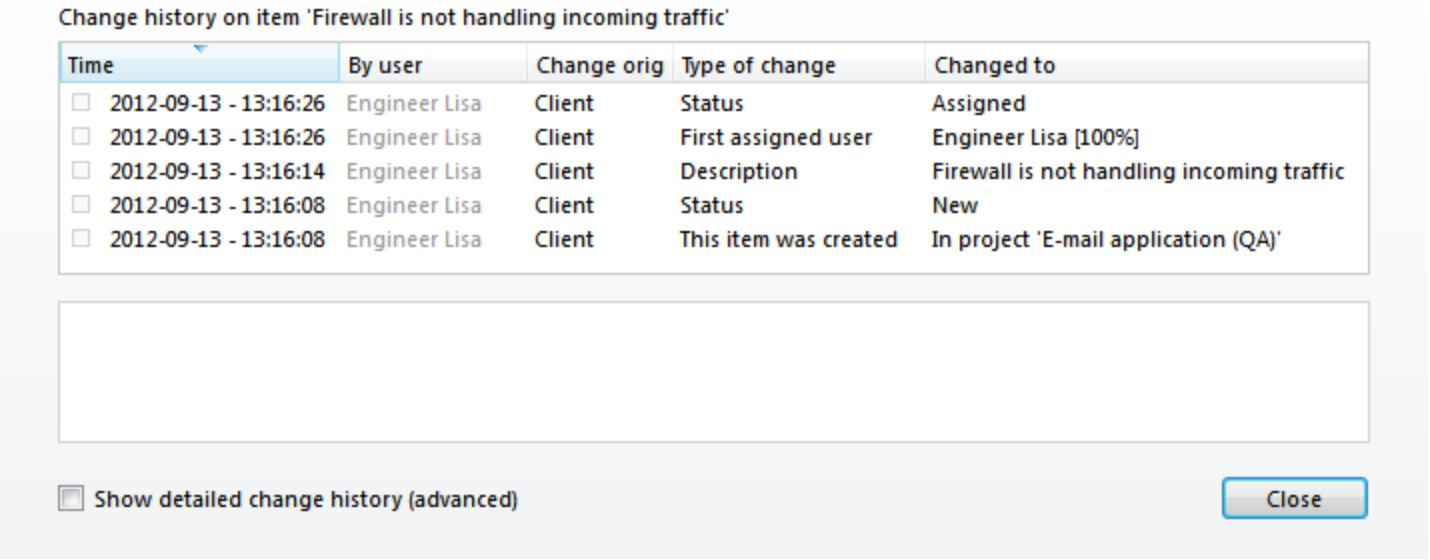
In order to analyze the actual workflow on a bug, you may want to see the detailed change history.

Everything that happens to a bug (or a task) is stored on the Hansoft server and then retrieved on demand.

Right click and select **View change history on...** or press Ctrl + Shift + I (Cmd + Shift + I):



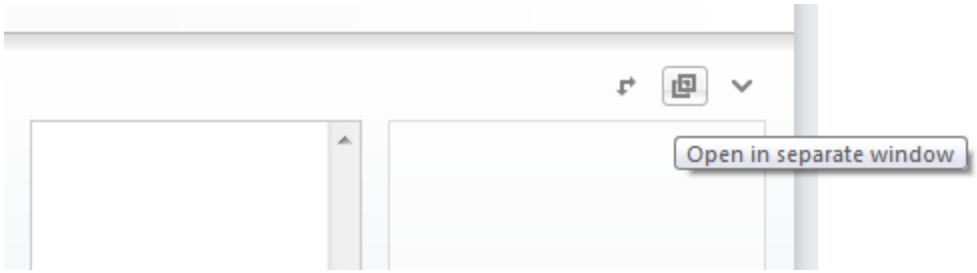
A detailed bug history will be presented:



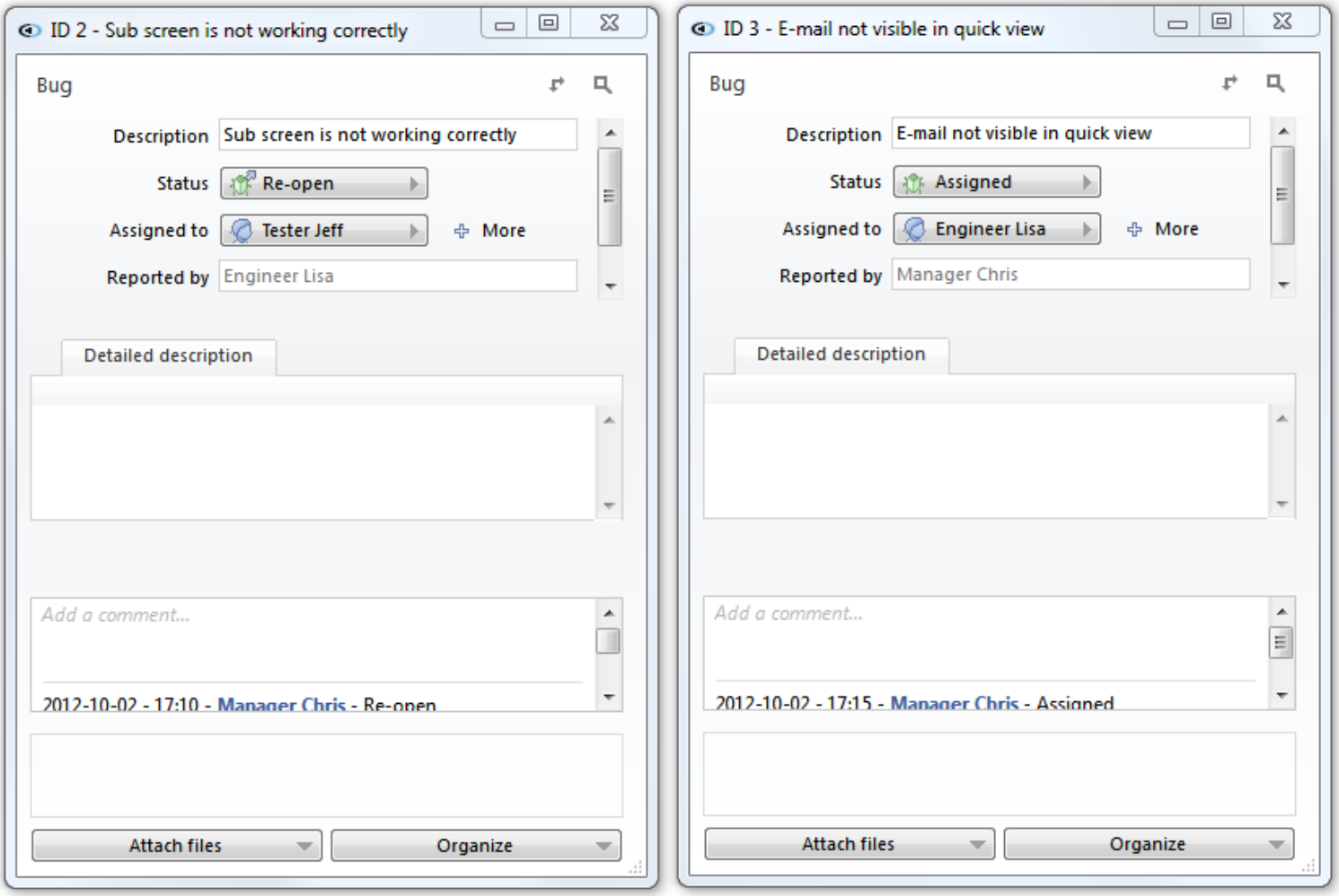
Working with multiple bugs at once

You can work with multiple bugs at once in Hansoft.

Click on the button in the details window:



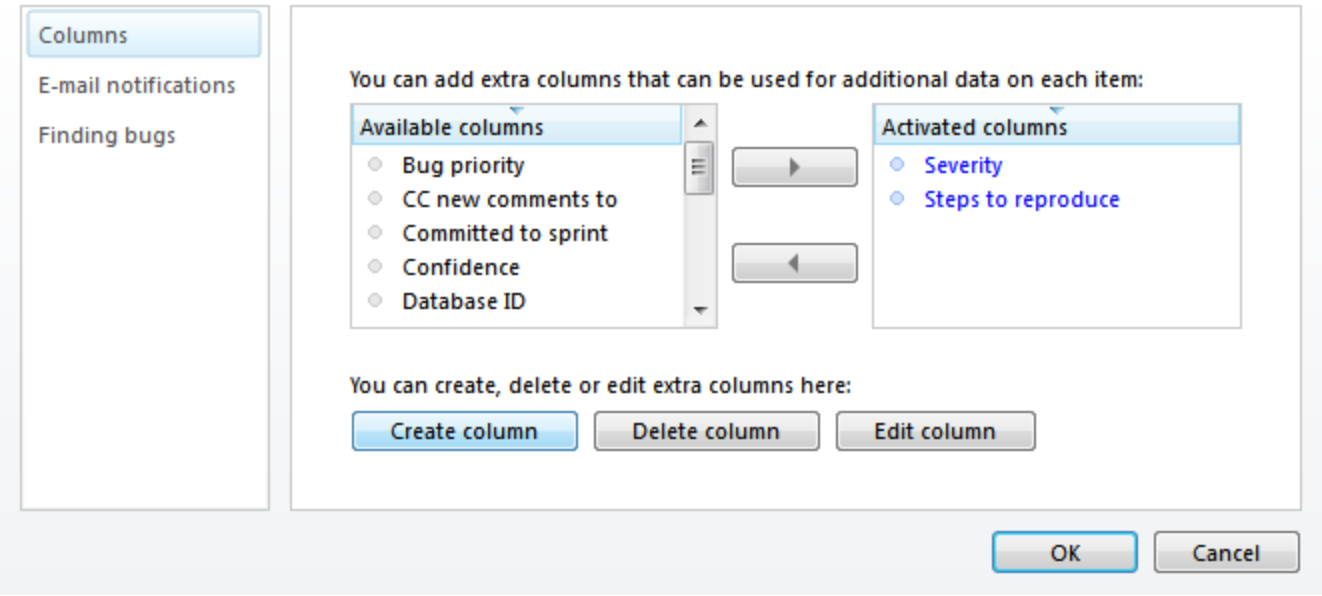
You can now work with multiple bugs in separate windows:



Assign bug dependent on classification

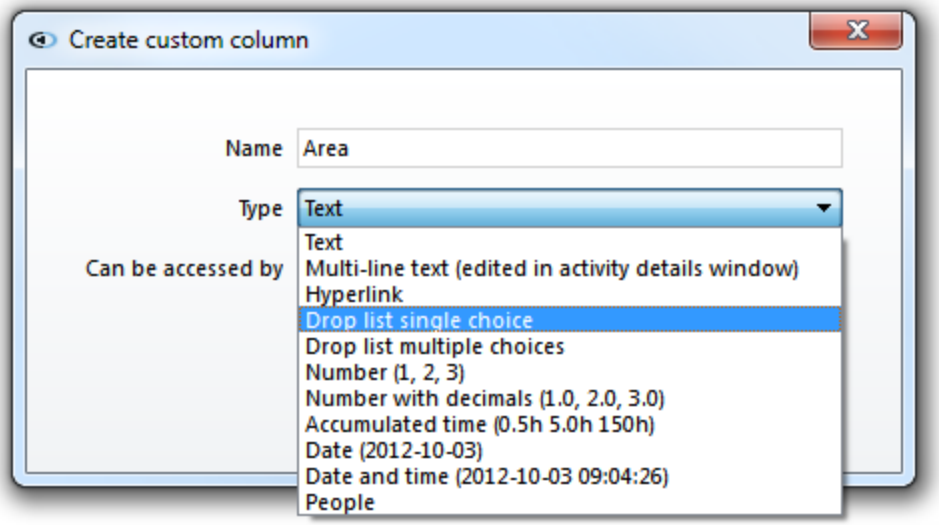
You can assign a bug to someone dependent on the selected drop list item. This can for example be used to assign a bug dependent on a classification like "art", "engine" or "textures".

Go to **More..>Customize project(quality assurance)...**, and create columns.

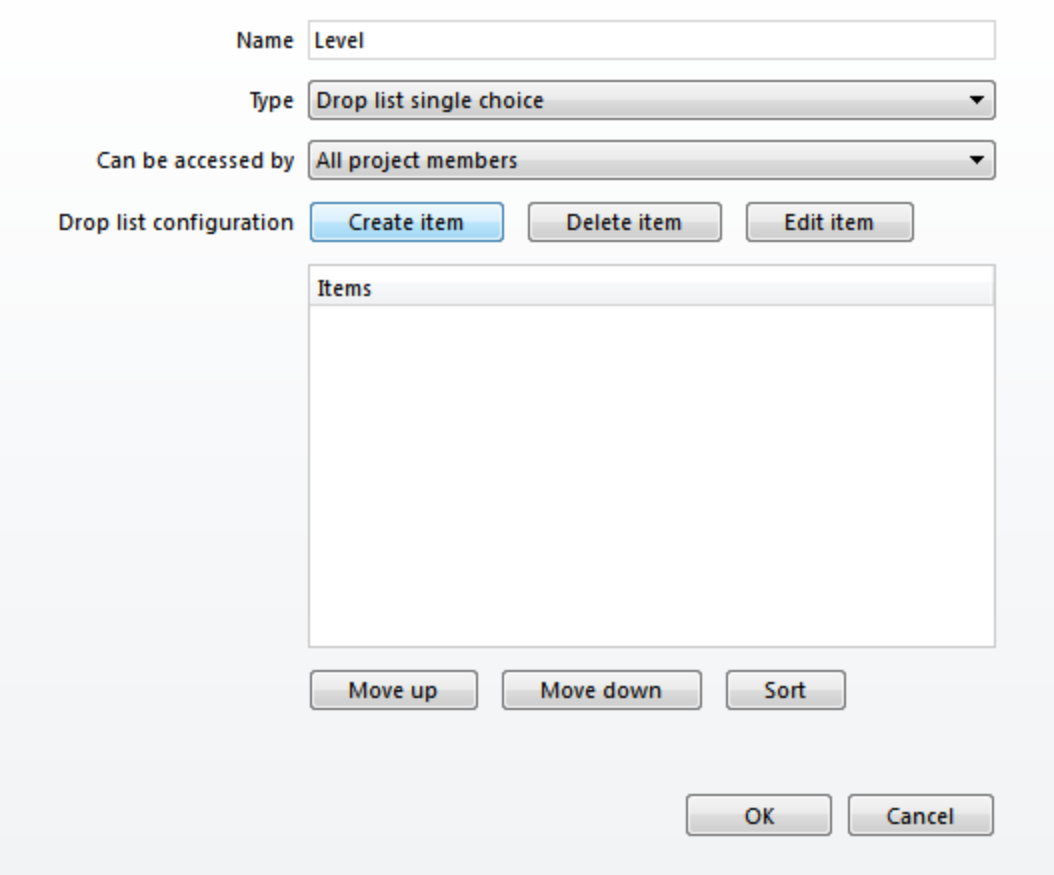


The **Create column** button in the "Customize project" (QA) dialog

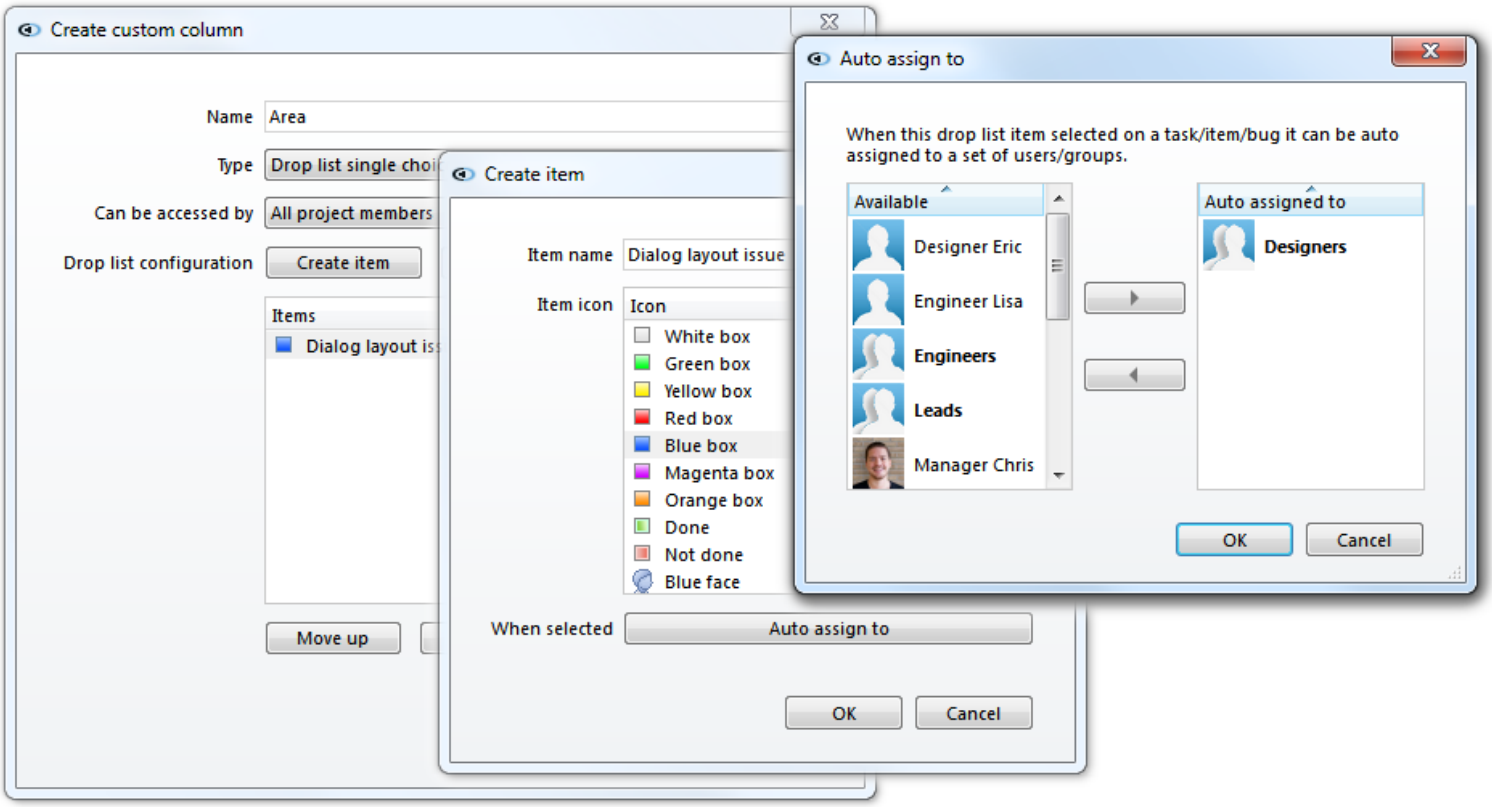
Create a drop list item and select Auto assign to users/groups":



Creating a droplist custom column



The **Create item** button in the "Create column" dialog



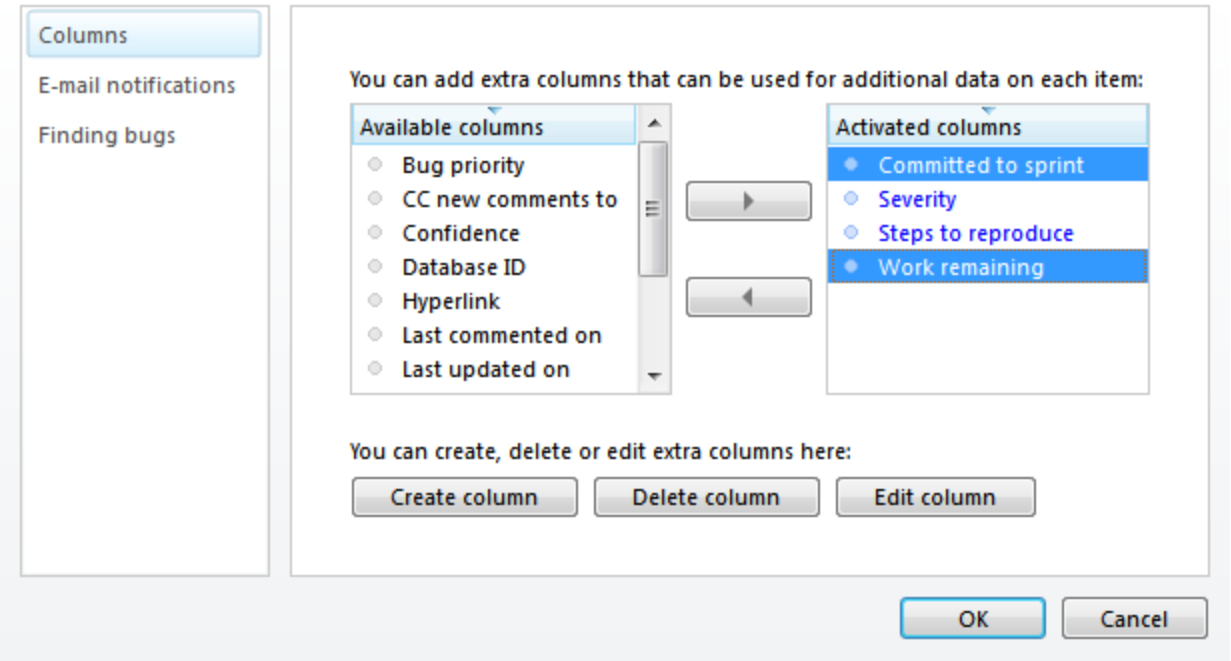
Setting an auto-assign user for a custom column drop list item

Selecting that drop list item will now assign the bug to the user or users in the group.

Commit bugs to a sprint/iteration

You can commit bugs to a sprint/iteration and report work remaining (hours) on them. This can be important because in a sprint/iteration bugs can stack up, taking extensive time to solve. This should be counted when measuring the total hours remaining on the sprint.

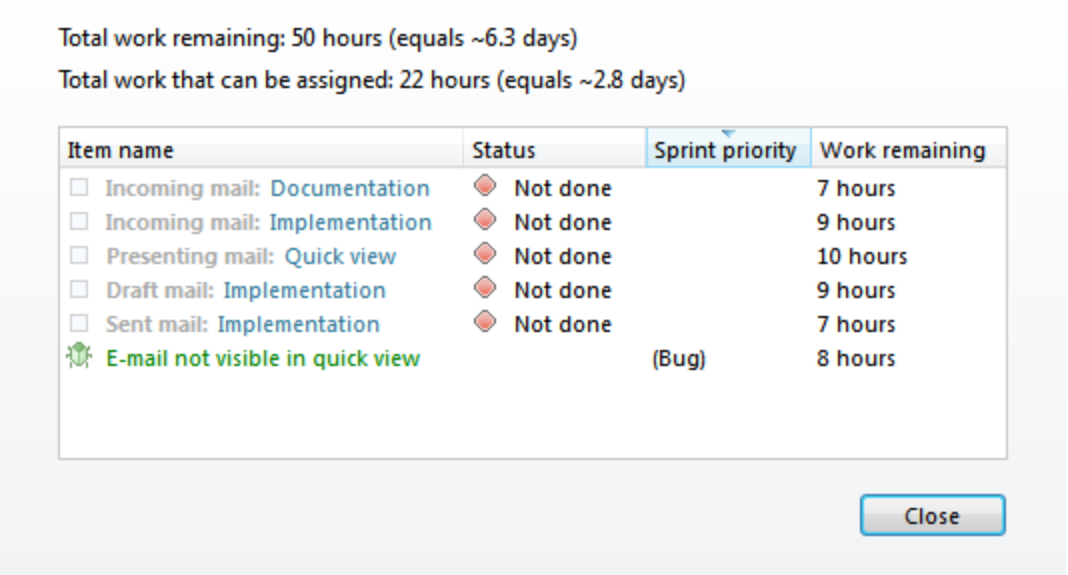
This functionality is enabled through the use of custom columns: Committed to sprint and Work remaining.



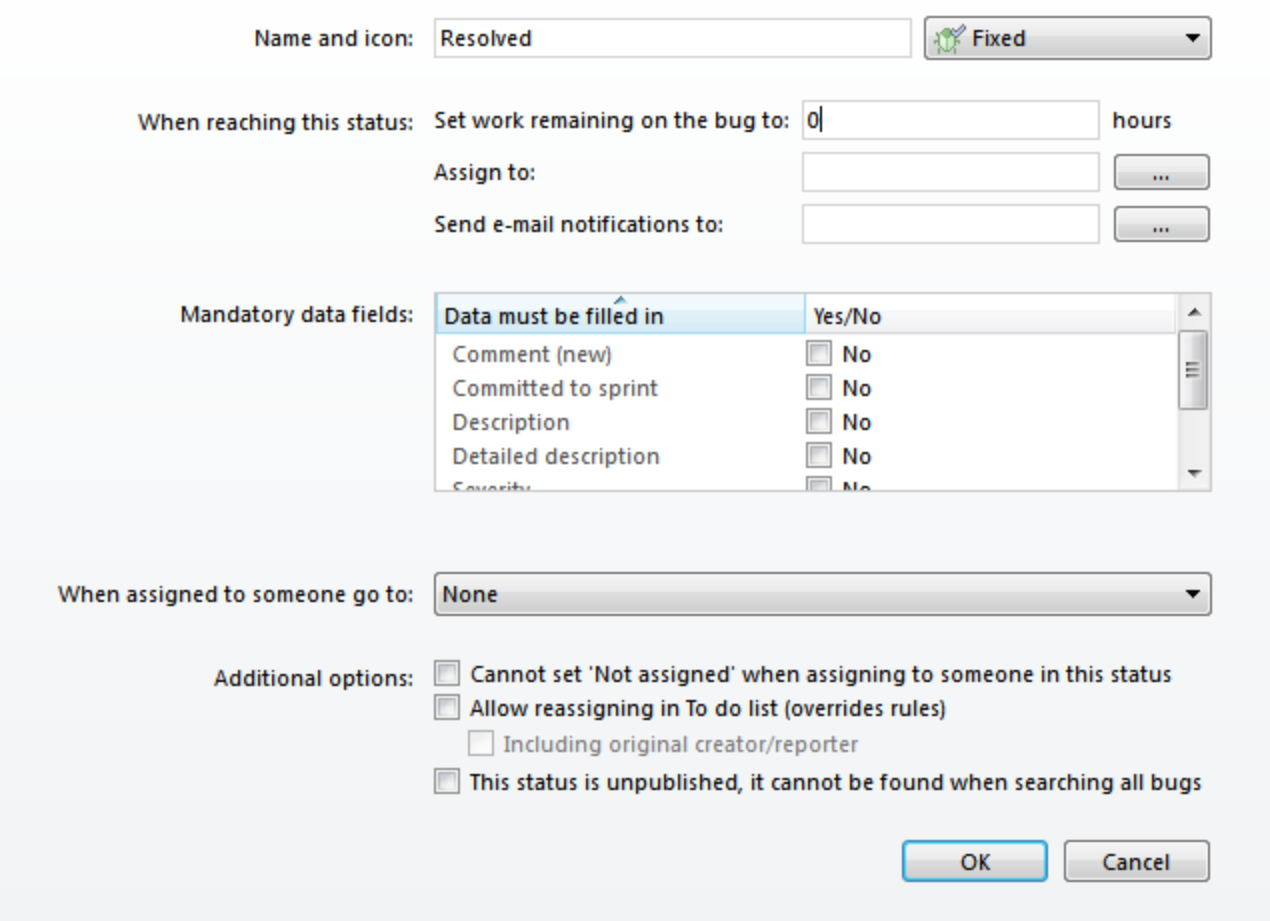
The custom columns section of the Customize project dialog for QA

Bugs can now be assigned to sprints using the Committed to sprint column, where users can treat them much like tasks. By using the Work remaining column, the hours estimated will be included in user allocation calculations.

Bugs will also show up in the summarized list of tasks available in the People section of the sprint:



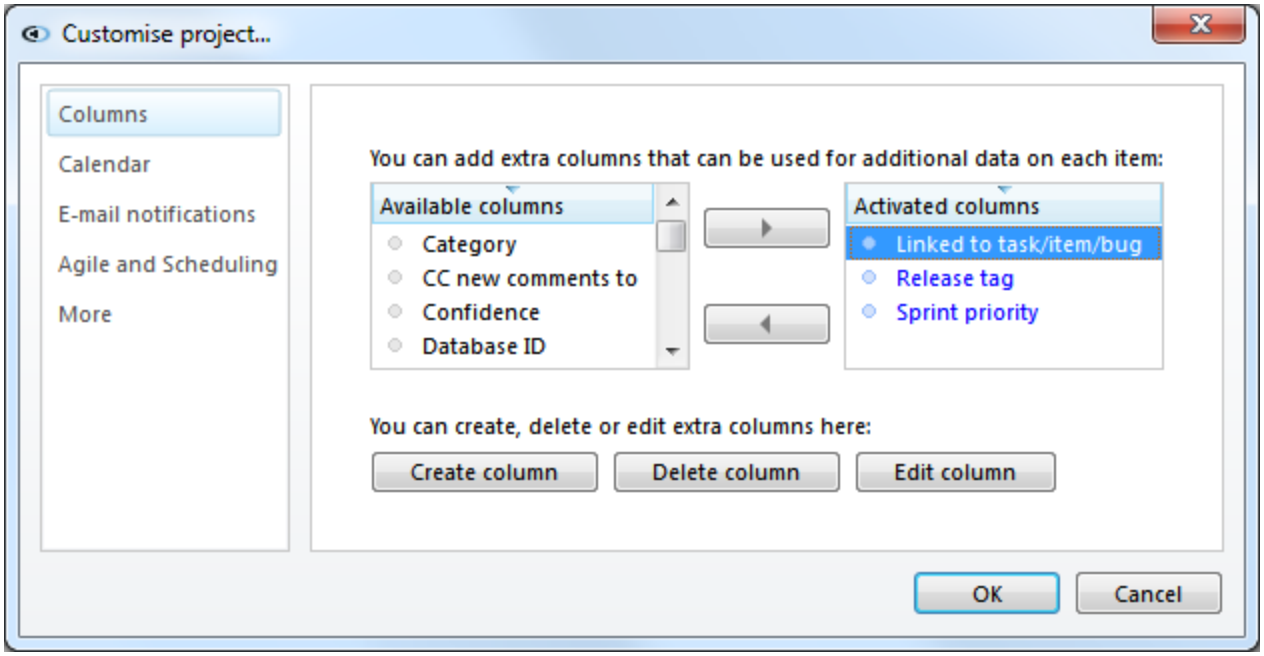
When a bug has reached a bug status, zero hours can be set automatically (mostly used when the bug is fixed/resolved):



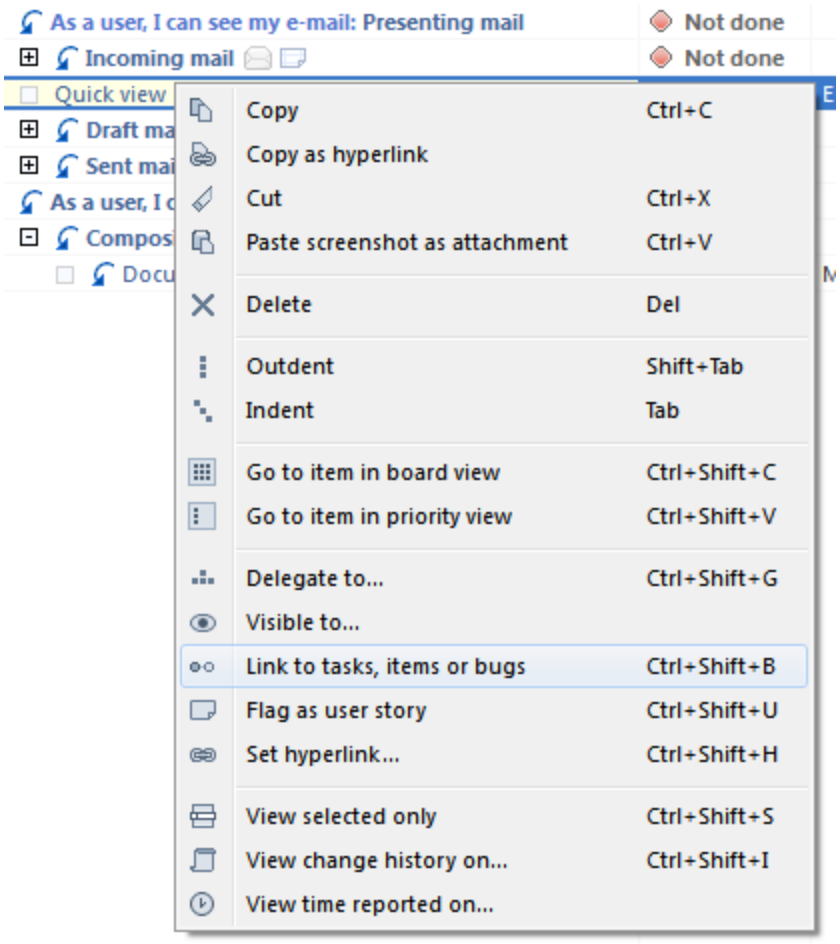
Linking to tasks/items/bugs

Hansoft offers functionality to link a task/item/bug to another task/item/bug. One of the most common cases is to link bugs to tasks and vice versa. This is, for example, useful when there are bugs related to a new feature in the product or similar cases.

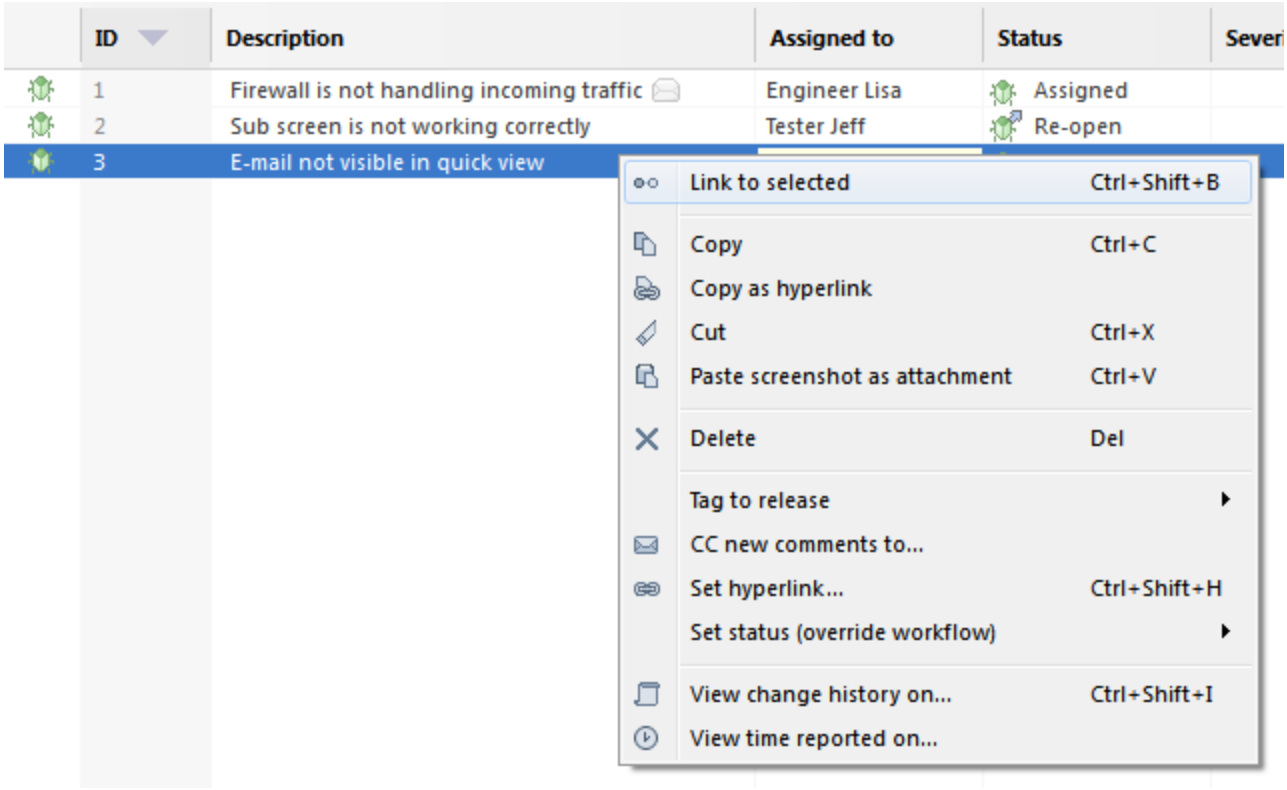
To activate this function, you must activate extra column "Linked to task/item/bug" in customize (both in QA and in the planning view):



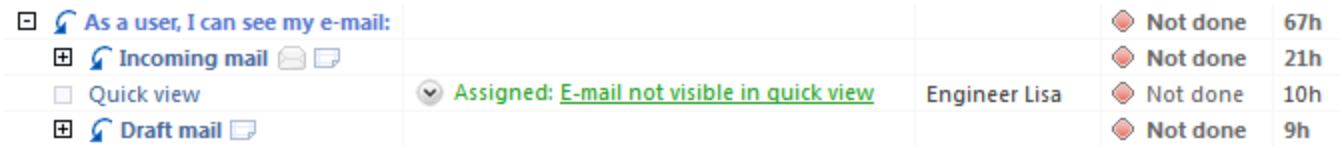
Go to the task or backlog item and select **Link to tasks, items or bugs**:



Now go to the QA view, right click and select **Link to selected**:



A link to the task/backlog item will now be visible in the column (it is cross-linked so a bug link is visible in the planning view):



QA user accounts

Hansoft offers a quick and easy way to connect external testers without upgrading your license capacity. This is done by creating QA accounts.

QA accounts can

·Log in and report bugs

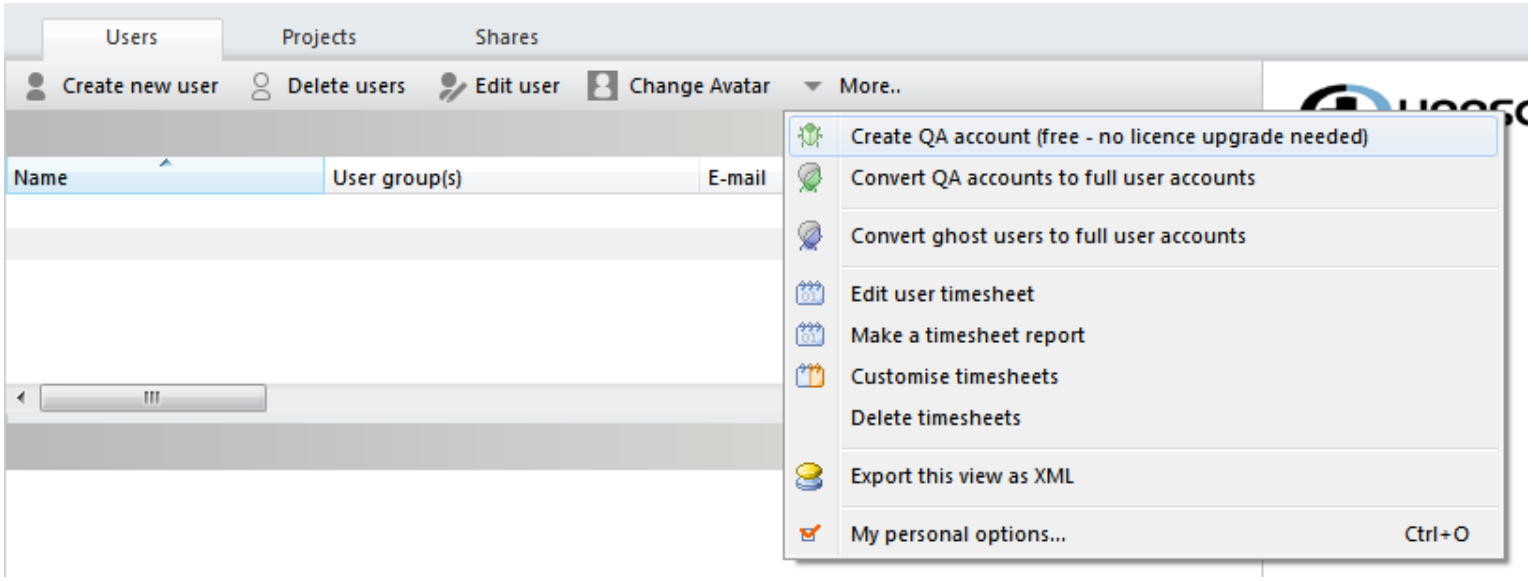
·Be used as a user in the QA part of a project

QA accounts cannot

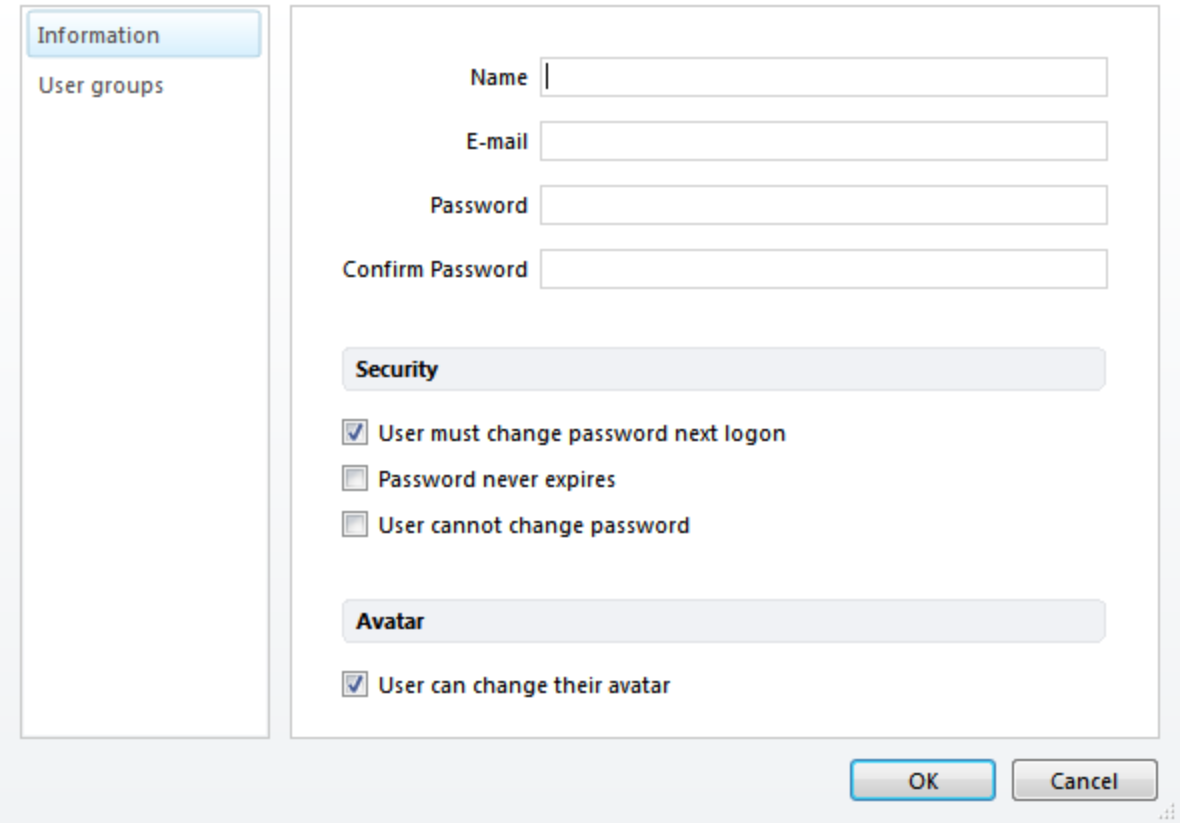
·Access "Portfolio allocations", "Portfolio find" or "Administration"

·Be used as a user in agile or scheduling projects

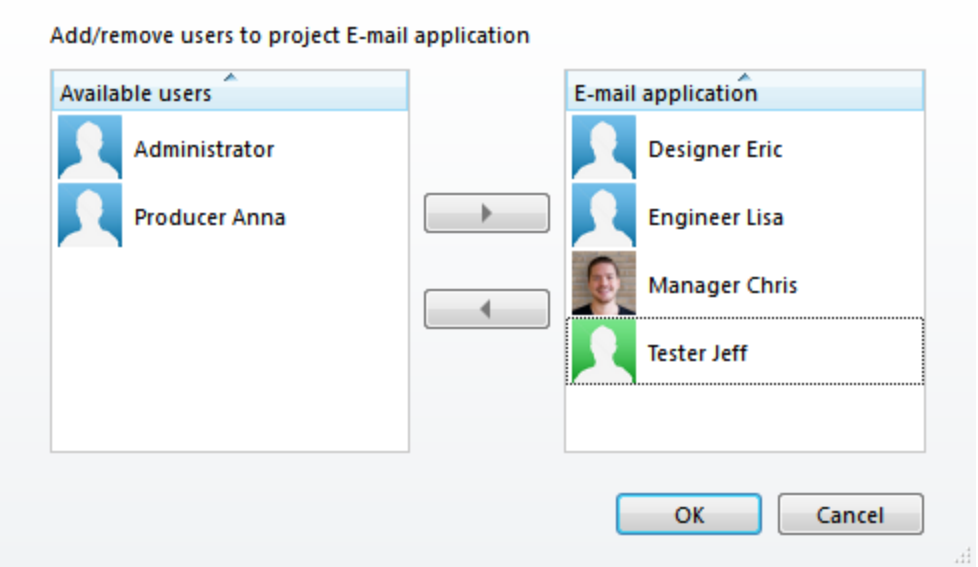
To create QA accounts, you must have administration rights. Go to Administration, Users and then the **More..** menu.



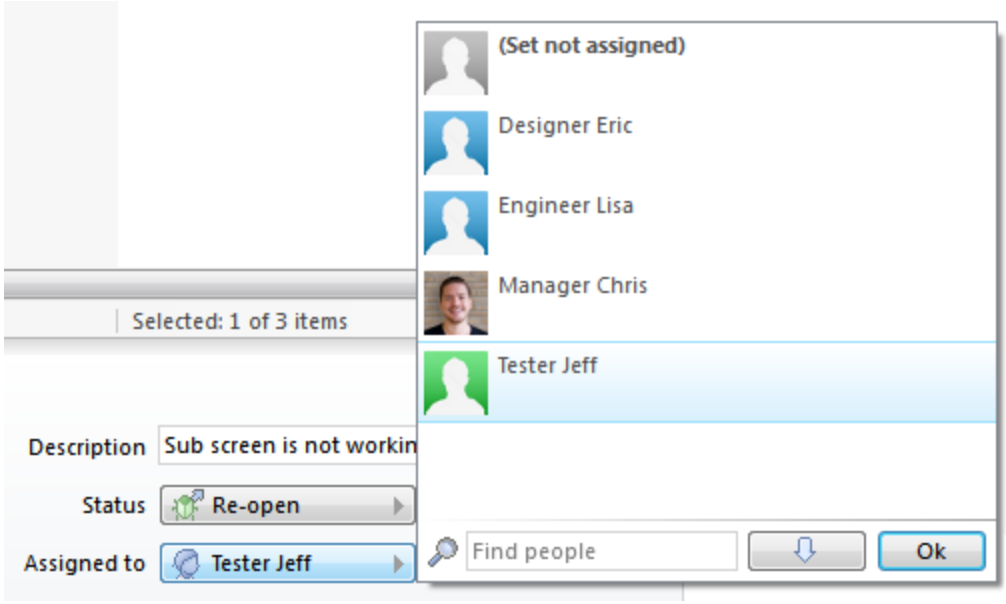
You can create a new QA account and handle it in the same way as normal user accounts:



You then add the newly created user to the project and he/she can be used as a user only in QA (not in scheduling):



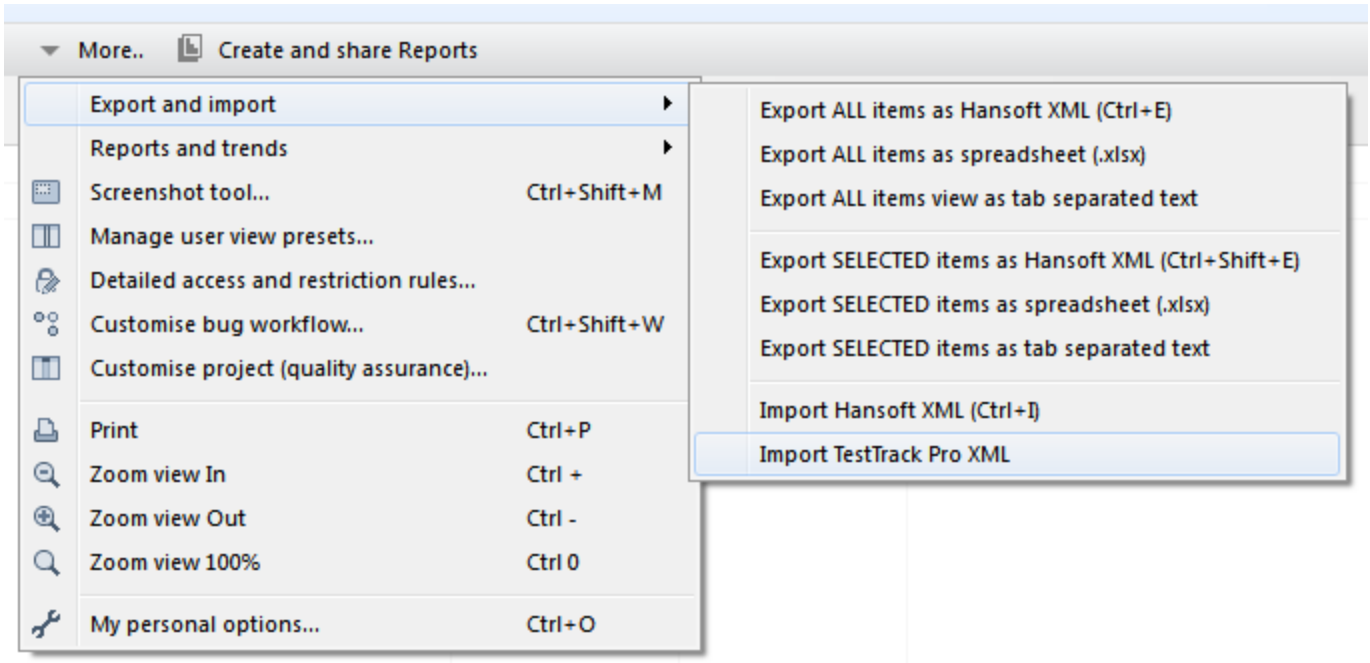
The external tester can now be used as a user in the QA part of the project:



Importing TestTrack Pro XML

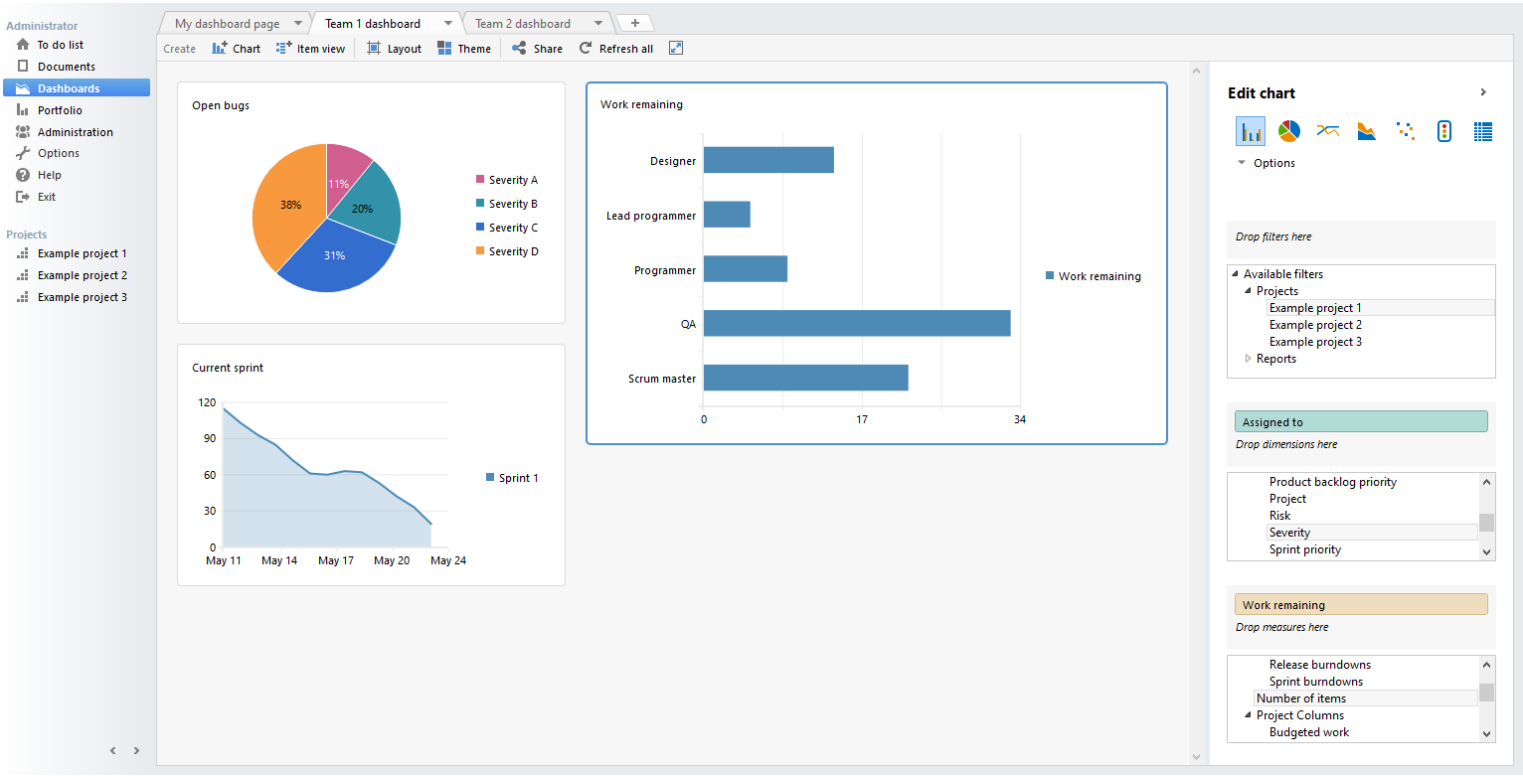
Hansoft offers functionality for importing TestTrack Pro XML directly into Hansoft. You have to be either a Main Project Manager or have a rule granting you access to importing. You must also be able to report new bugs in the workflow.

Go to **More..>Export and import>Import TestTrack Pro XML**. Please note that custom column fields will not be created and imported.


More..
Create and share Reports
Export and import
Reports and trends
Screenshot tool... Ctrl+Shift+M
Manage user view presets...
Detailed access and restriction rules...
Customise bug workflow... Ctrl+Shift+W
Customise project (quality assurance)...
Print Ctrl+P
Zoom view In Ctrl +
Zoom view Out Ctrl -
Zoom view 100% Ctrl 0
My personal options... Ctrl+O
Export ALL items as Hansoft XML (Ctrl+E)
Export ALL items as spreadsheet (.xlsx)
Export ALL items view as tab separated text
Export SELECTED items as Hansoft XML (Ctrl+Shift+E)
Export SELECTED items as spreadsheet (.xlsx)
Export SELECTED items as tab separated text
Import Hansoft XML (Ctrl+I)
Import TestTrack Pro XML

Introduction to dashboards

Dashboards is a new feature Hansoft 8 that allows for the creation and management of BI charts.



Features

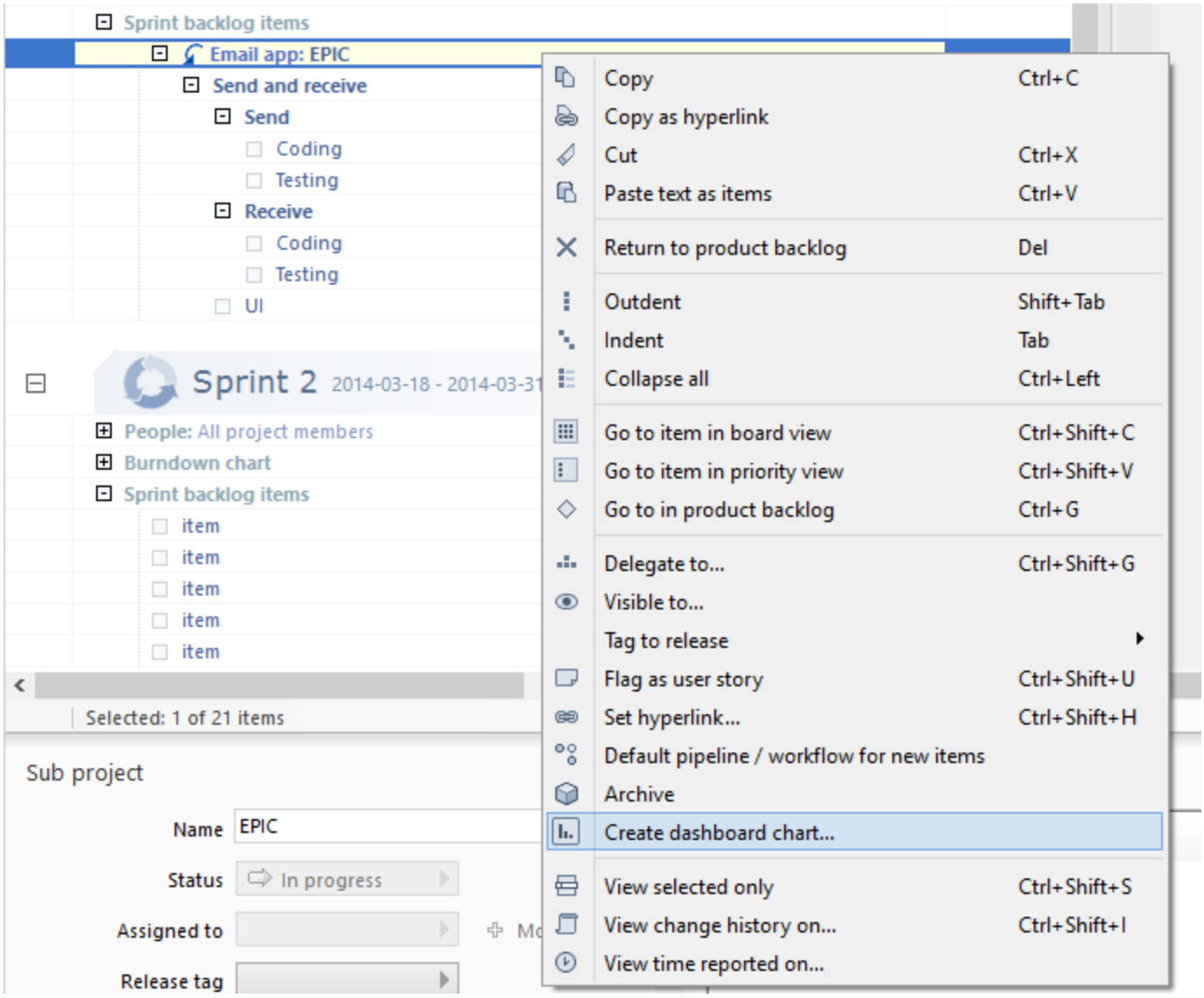
- Access relevant Hansoft data, visualize it in a way that makes it actionable and accessible to your team and co-workers.
- Build dashboards and display your data as metrics using a number of different chart types. Share your dashboards with other users.
- Customize your dashboards by adding pages, altering the chart layout and adjusting the color theme to achieve greater structure and personalization.
- Save your charts locally as PNG, PDF or xlsx spread sheets.
- The dashboard wizard allows you to create charts from selected items in the planning view.
- Reports gain new purpose in Hansoft 8 as they can now be used to filter items for your charts.

The dashboard wizard

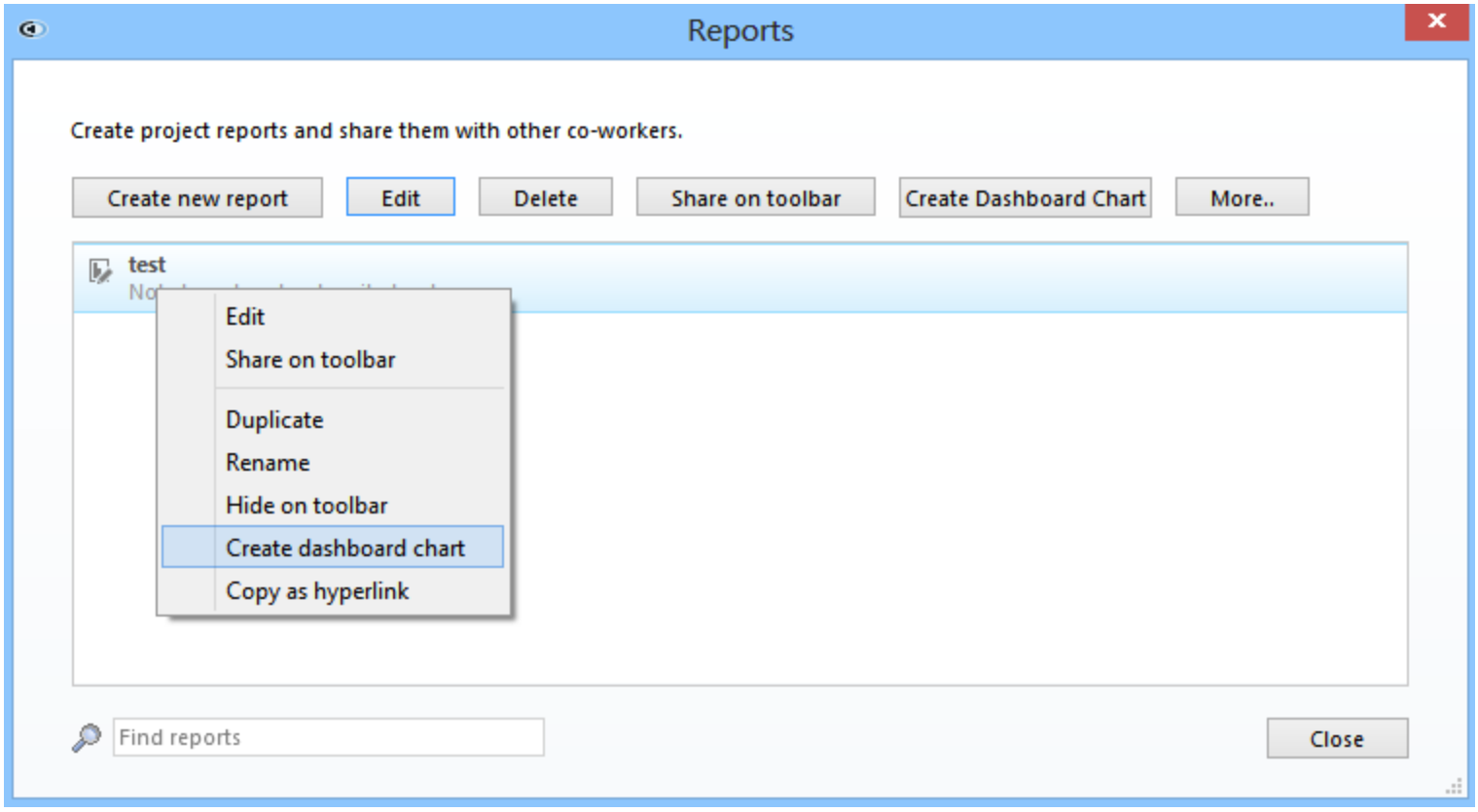
The dashboard wizard allows you to create charts from either the backlog or planning view, or from a report. This allows you to quickly create charts using a chosen subset of your project data.

To create a chart directly from the planning or backlog view start by selecting a single item with children, right clicking on it and choosing "Create dashboard chart...".

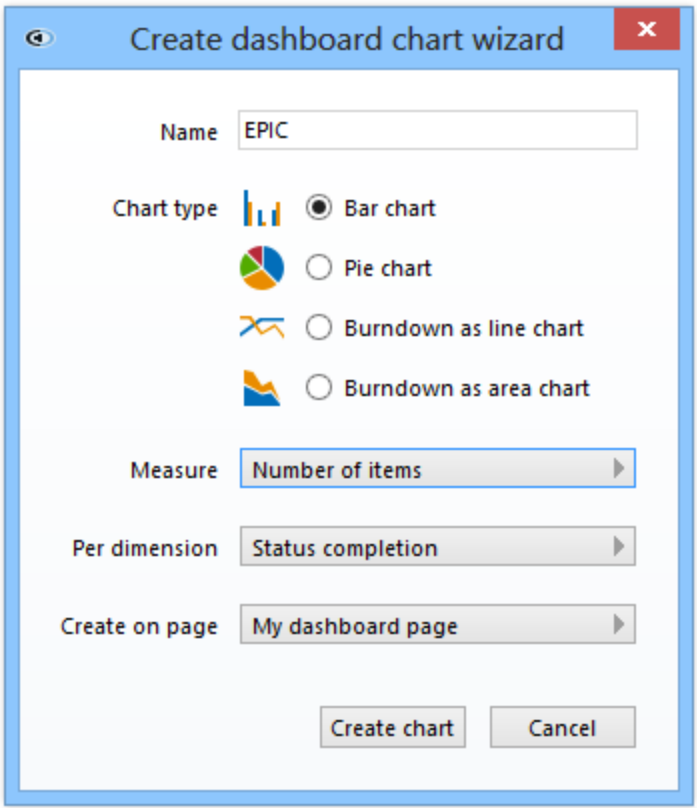
Note: It is only possible to generate charts of a single item and its children.



To create a chart from a report you start by selecting the report in the Reports dialog, right clicking on it and selecting "Create dashboard chart...":



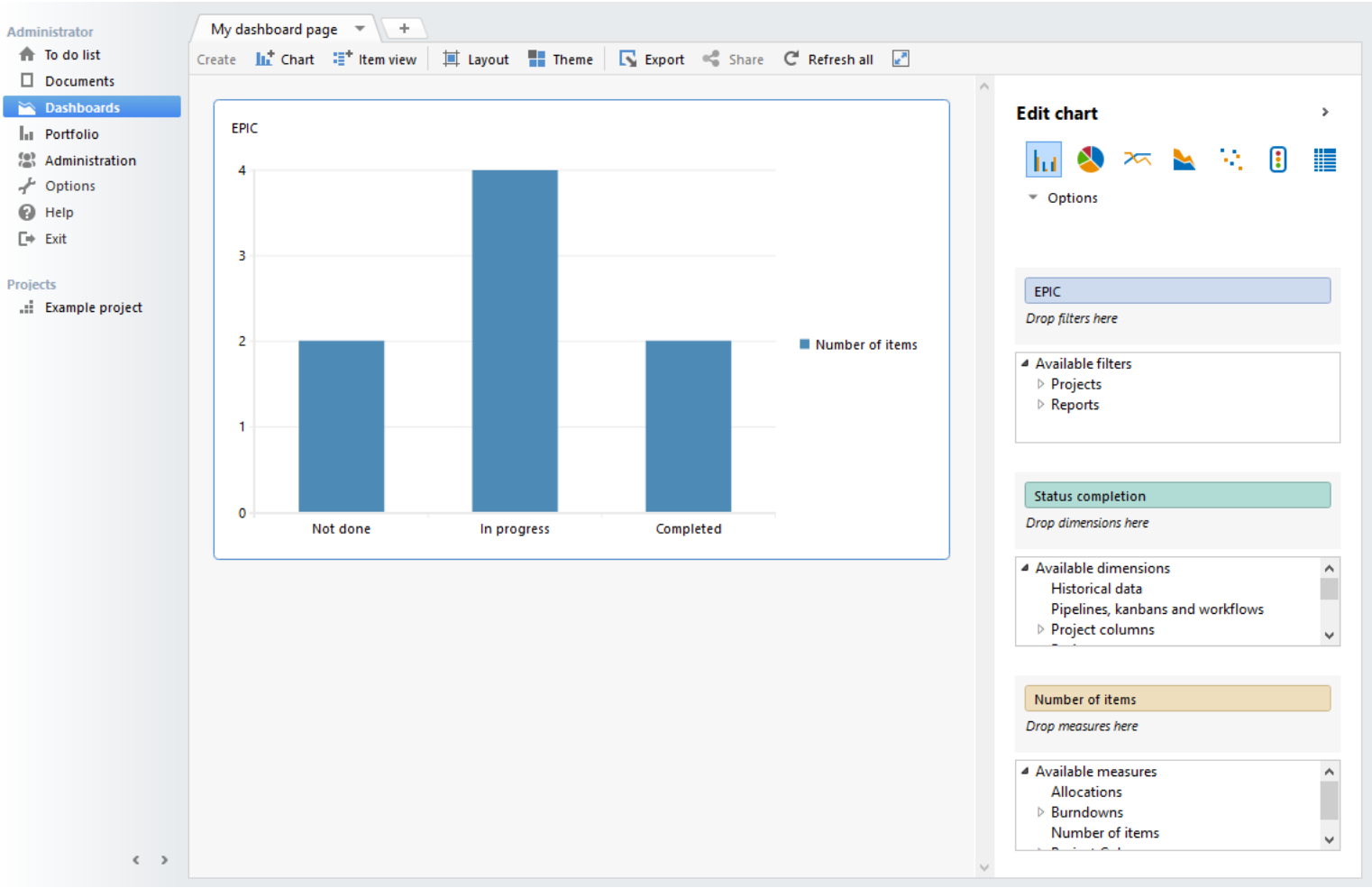
In either case you will be brought to the dashboard wizard:



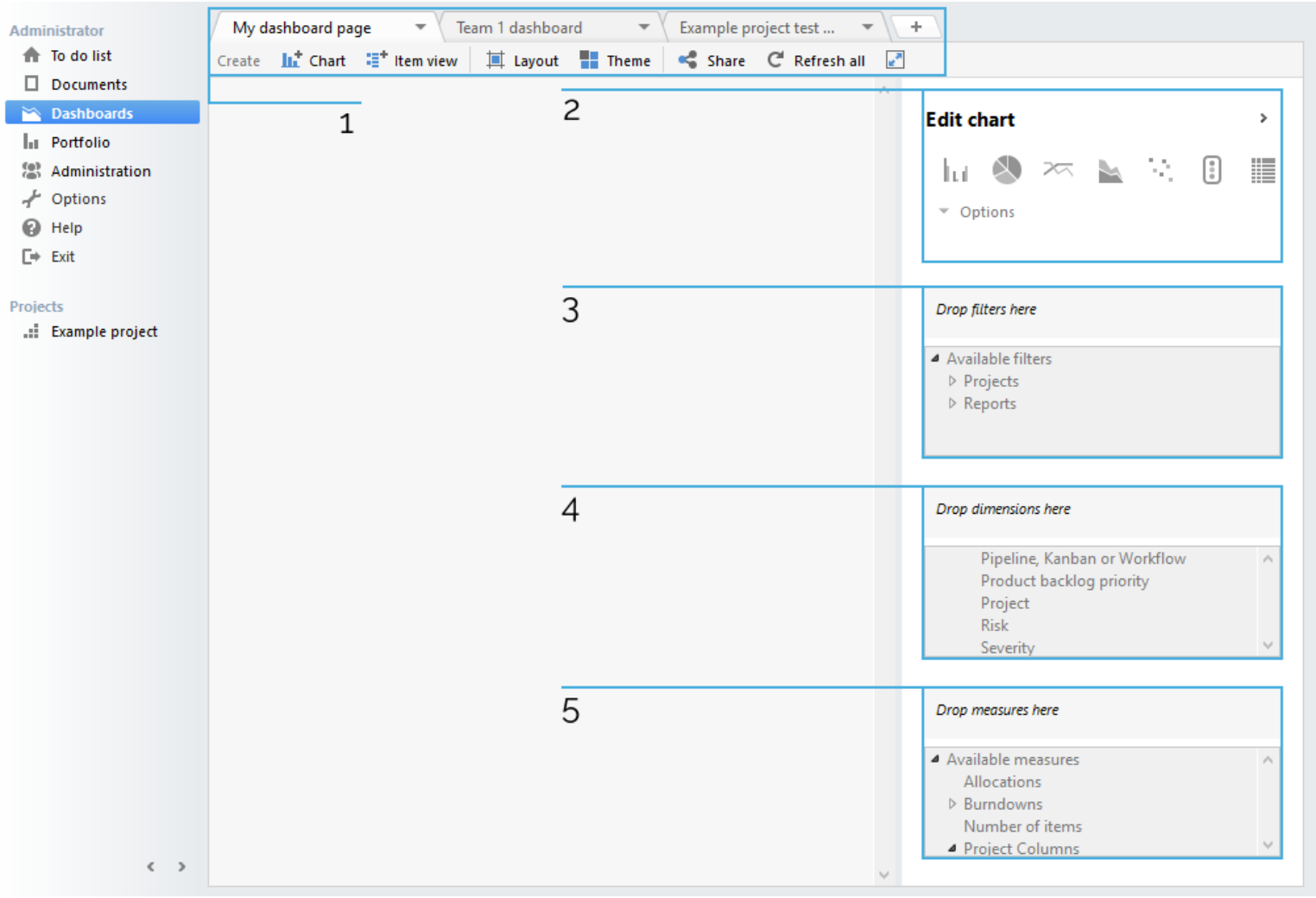
Here you get to name your chart, select it's type (bar, pie, burndown line, burndown area, You can read more about them here.) as well as the measure and dimension you wish to use. You also specify the page on which you want the chart created. The new chart will be added to the end of the chosen page.

The wizard simplifies chart creation by providing a limited set of options. A chart created in the wizard can be edited from the Dashboards tab.

In this example the measure **Number of items** and the dimension **Status completion** are selected.



The dashboard view



The dashboard editor

1 - Toolbar and page tabs

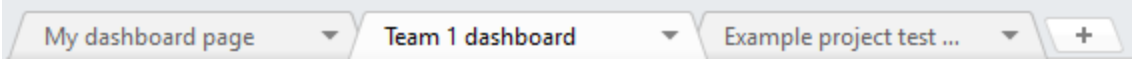
2 - Chart configuration options

3 - Filter options

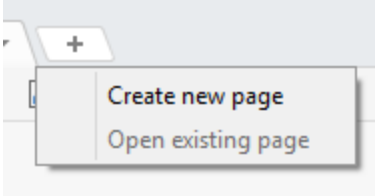
4 - Dimension options

5 - Measure options

Page tabs

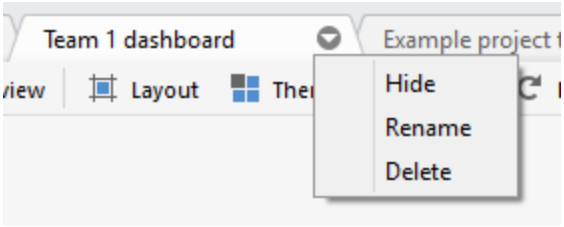


The page tabs let you navigate between different dashboard pages that you have access to. To create a new page click the plus button located to the right of your page tabs and select **Create new page**.

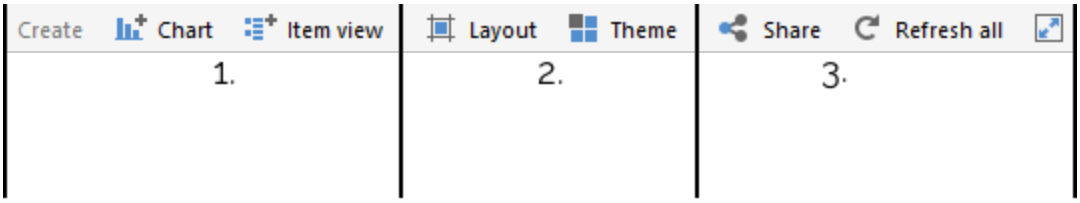


You can also open existing pages that have been hidden through dashboard page options.

Pages can be hidden and, if you have edit permission, rename or deleted.



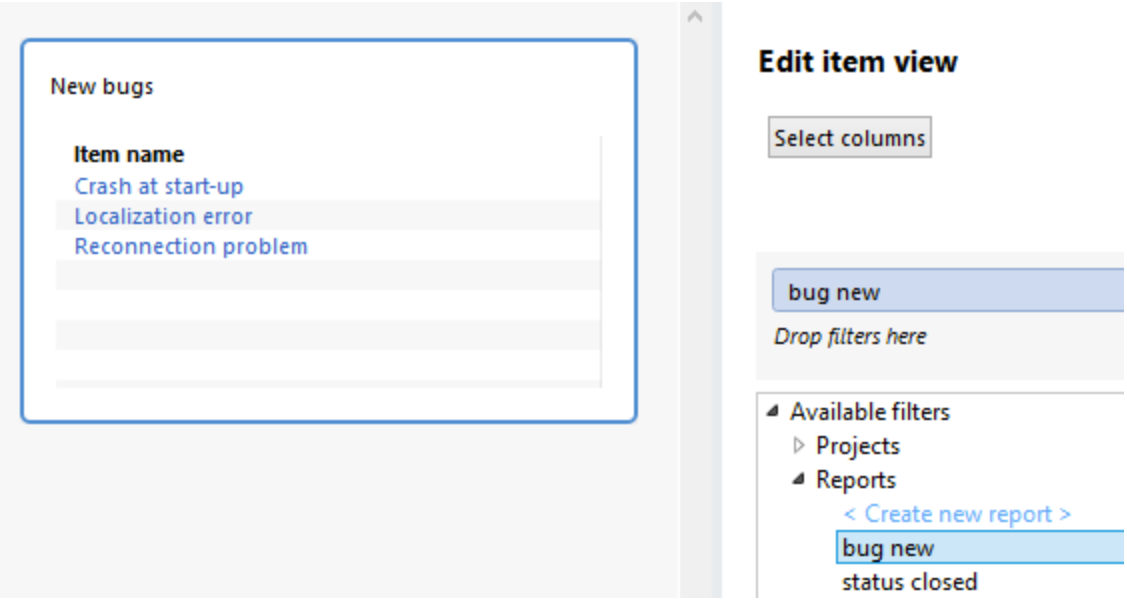
Toolbar



On the toolbar you can find options to create and manage dashboard pages and charts.

1. Chart creation

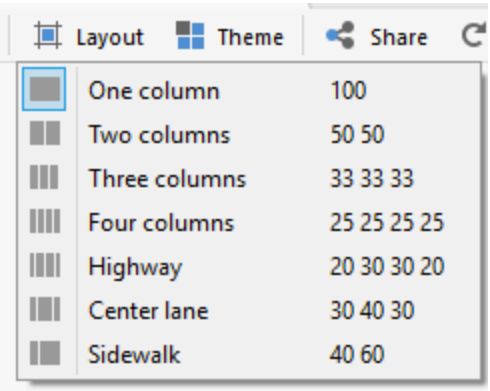
The chart and item view buttons create a new chart or items view on the current page. New charts will appear at the bottom of the current page in the next available position.



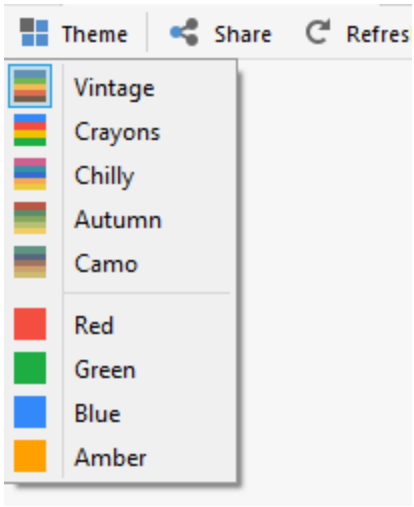
Item view with report that finds new bugs

2. Page presentation

The Layout button allows you to select the layout to use for the current page from the options shown below. The numbers show the column widths as percentages of the view width.



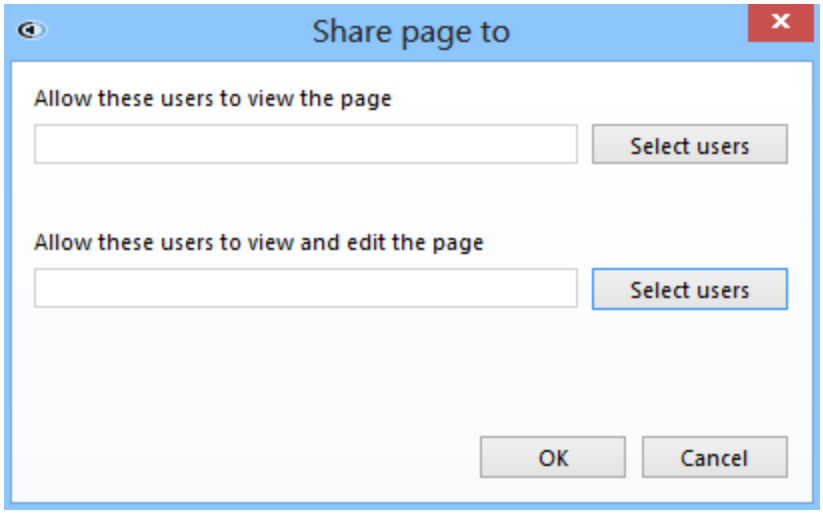
The Theme button allows you to select a color theme to use for the current page.



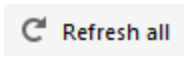
By default charts use the color theme of the page they are on, but individual charts can have their theme overridden via their chart options.

3. Page options

If you have permission to share the current page the Share button will be available to you. When clicked you will be allowed to share the current page to users and groups for viewing or viewing and editing. You can revoke shared permissions at any time.

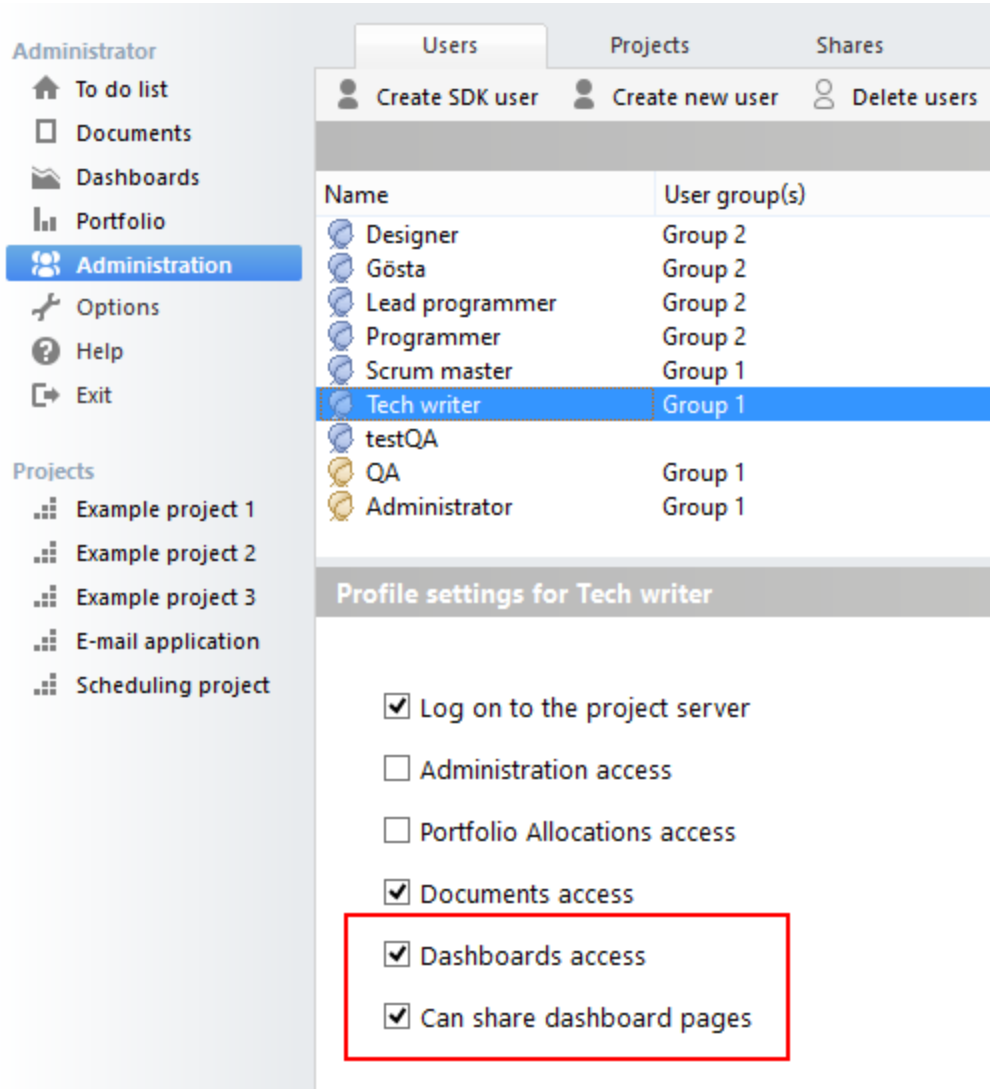


The Refresh all button requests that the server updates the charts on the current page as soon as possible.



Permissions

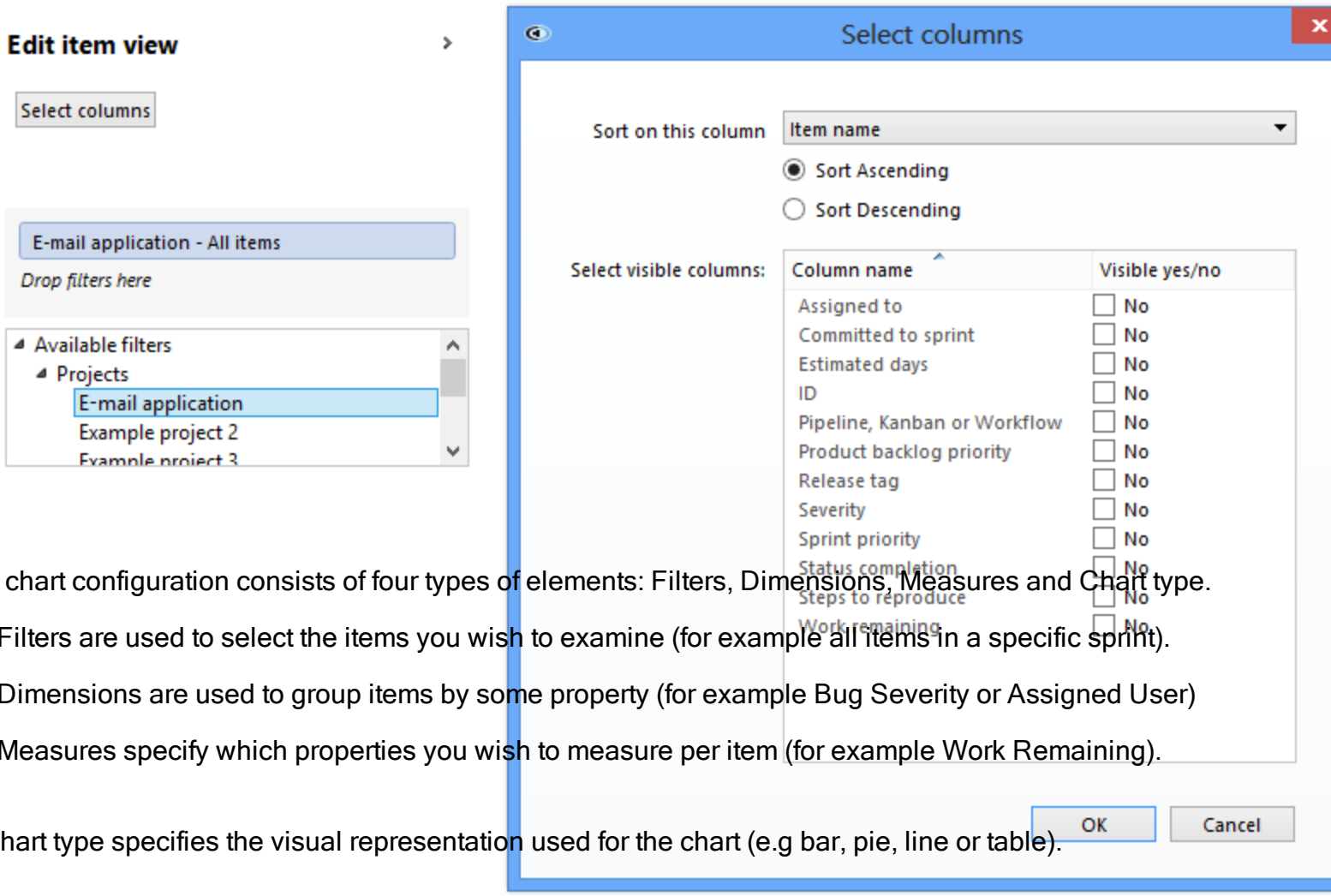
Access to the dashboards functionality and the ability for users to share dashboard pages to others can be controlled from the Users tab within the Administration section.



A chart is calculated with the permissions of the chart owner. This allows managers to share charts to others who do not have access to the individual items that the chart processes. Controlling who can share dashboard pages allows you to limit who can make information available to those with more restricted permissions.

Item view

Item views display lists of items in a tabular format. They allow you to specify filters to select the items you want included in the view, together with the columns to display and the order in which to sort the items.



A chart configuration consists of four types of elements: Filters, Dimensions, Measures and Chart type.

• Filters are used to select the items you wish to examine (for example all items in a specific sprint).

• Dimensions are used to group items by some property (for example Bug Severity or Assigned User)

• Measures specify which properties you wish to measure per item (for example Work Remaining).

Chart type specifies the visual representation used for the chart (e.g bar, pie, line or table).

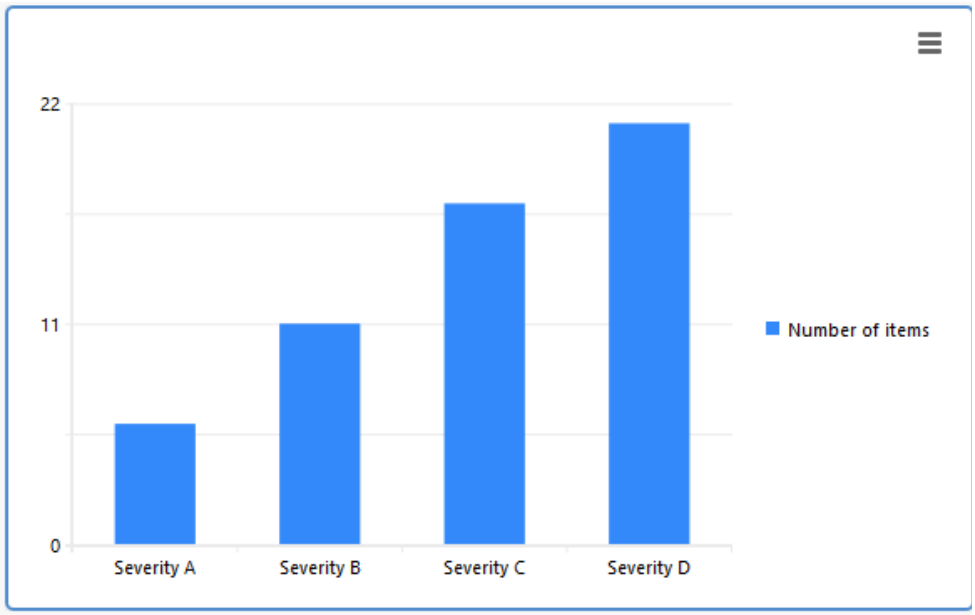
or example, consider that you wish to create a bar chart showing the number of bugs tagged to a specific release per severity level. The configuration of this chart would be:

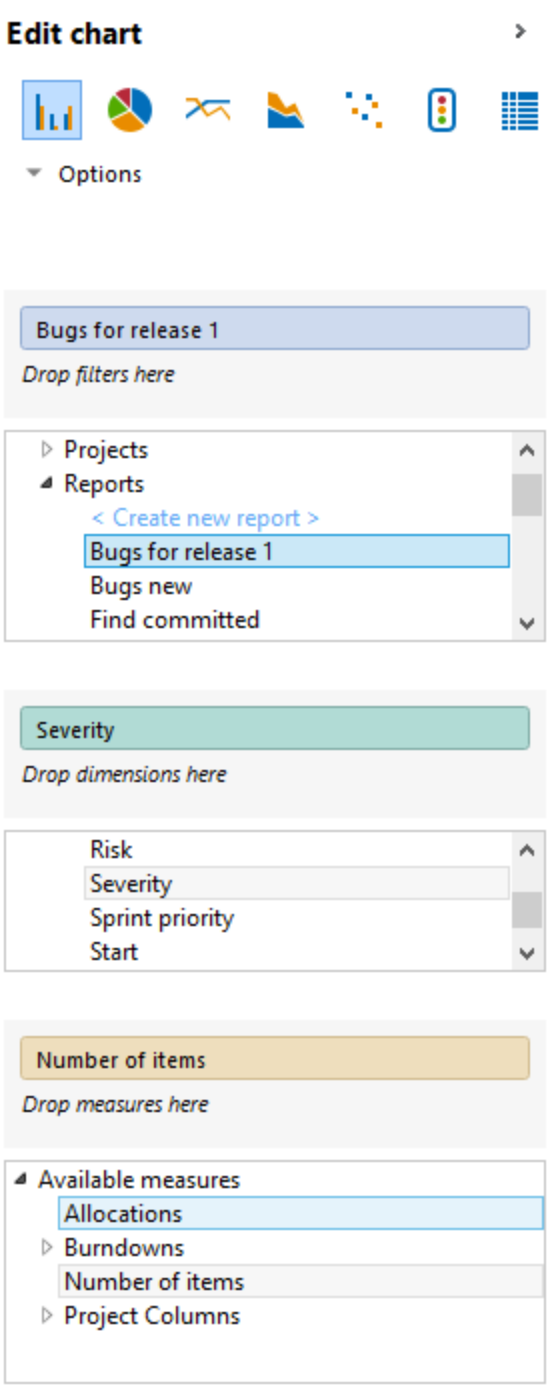
Filter: A report selecting all QA bugs tagged to the release in question

Dimension: Severity

Measure: Number of items

Chart type: Bar





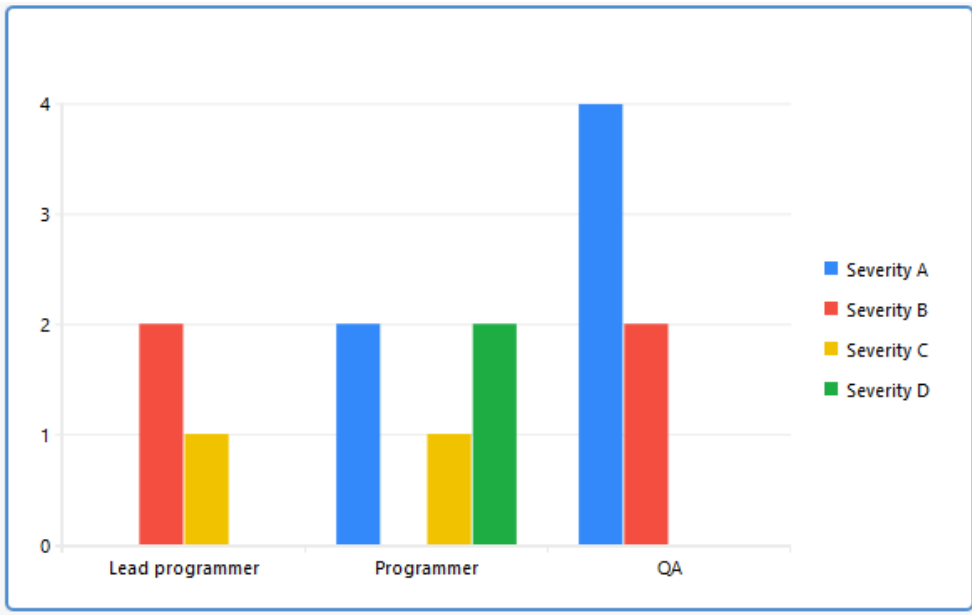
A chart can use more than one dimension or measure. Consider now that we want to change the chart to show the number of bugs assigned to each user of each severity for the specified release. This can be accomplished by adding the Assigned to dimension before the Severity dimension:

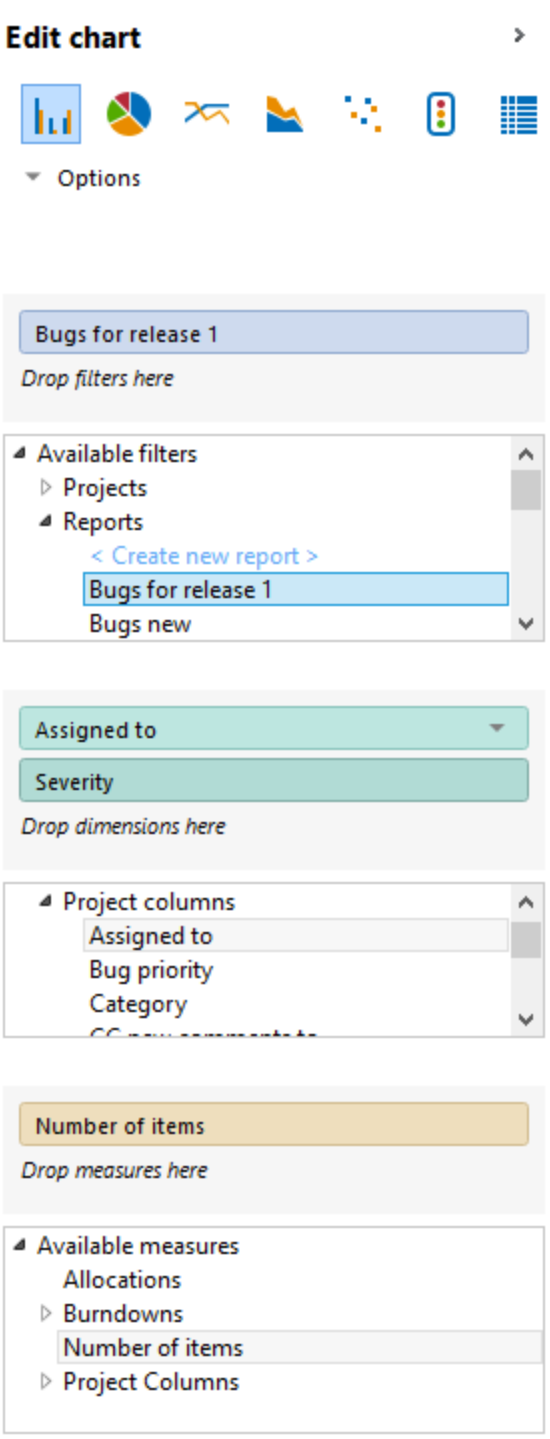
Filter: A report selecting all QA bugs tagged to the release in question

Dimension: Assigned to, Severity

Measure: Number of items

Chart type: Bar

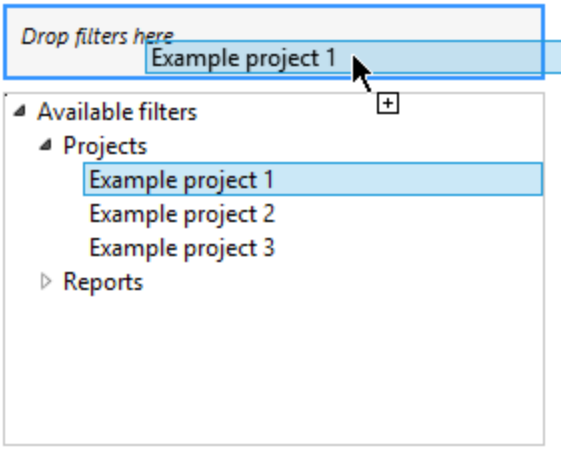




Using filters

Filters are used to select the items you wish to examine (for example all items in a specific sprint).

Filters are selected by dragging a filter from the list of available filters up to the active filter area:

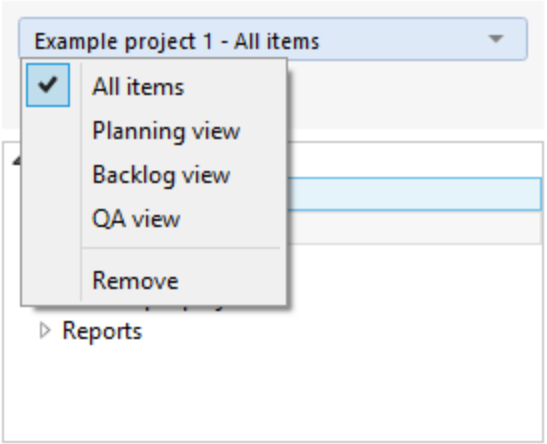


When multiple filters are specified items passing any of the filters are included. Items do not have to pass all active filters.

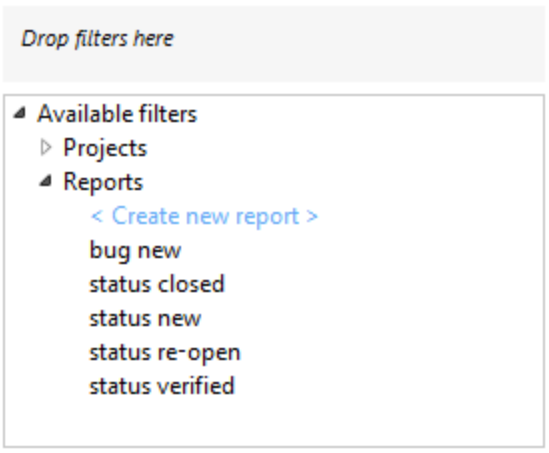
Filter Types

There are two available filter types: Projects and Reports.

Project filters allow you to select all items from a specific project, and then additionally limit these items to just those in the planning view, backlog or QA section by using their drop down menu:



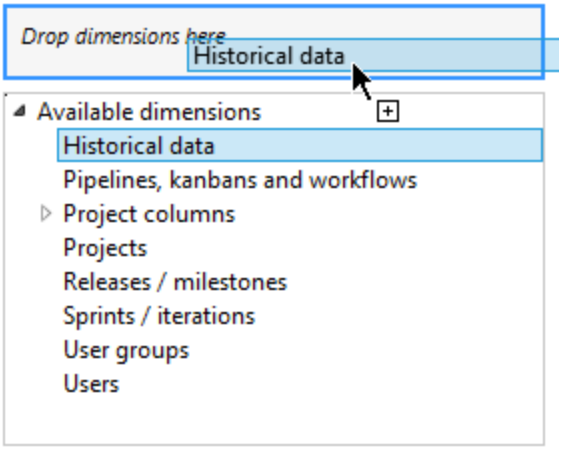
Report filters allow you to specify a report to filter all items by. Only items passing the report will be included in the chart calculation. All reports that you have access to are available for use as a chart filter. Reports taken from a specific project will only consider items in that project. Reports taken from the Portfolio section consider items from all projects you have access to.



Using dimensions

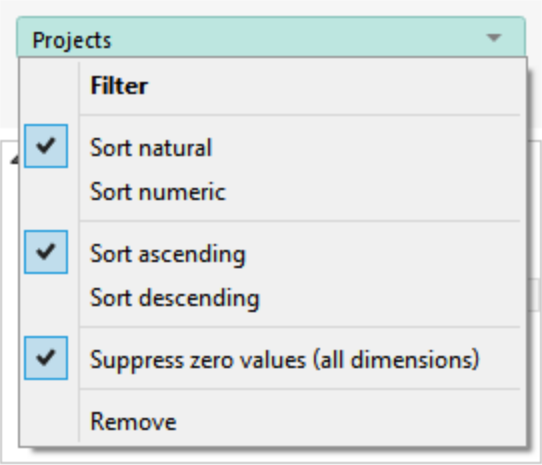
Dimensions are used to group items by some property (for example Bug Severity or Assigned User)

Dimensions are selected by dragging a dimension from the list of available dimensions up to the active dimension area:



Dimension options

Each dimension has a number of options that can be configured. To access a dimensions options click on the dimension itself.



Different dimension types have their own specific set of options that are covered below. There is one option that is global to the chart being edited: Suppress zero values.

When enabled Suppress zero values removes all rows who are all either zero or null.

Dimension Types

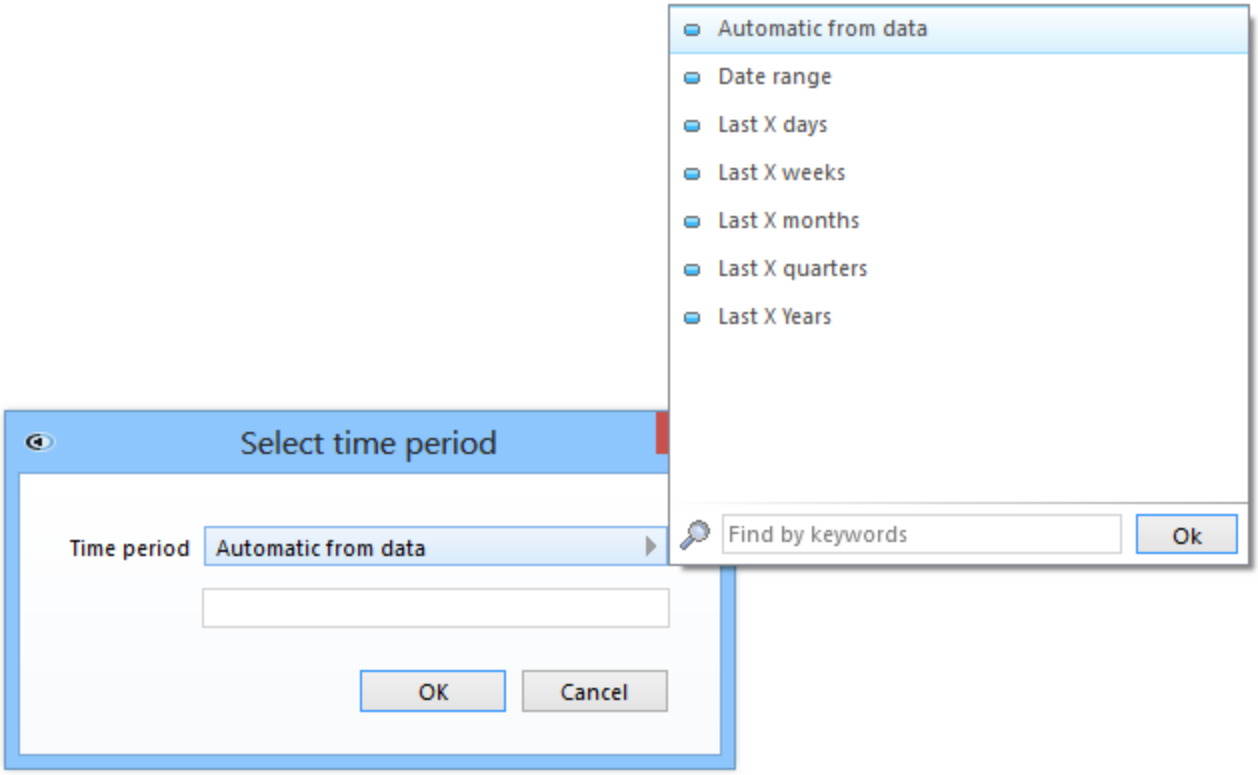
- Historical data
- Pipelines, kanbans and workflows
- Project columns
  - Discrete dimensions
  - User dimensions
  - Time dimensions
  - Other dimensions
- Projects
- Releases / Milestones
- Sprints / iterations
- User groups
- Users

Historical data

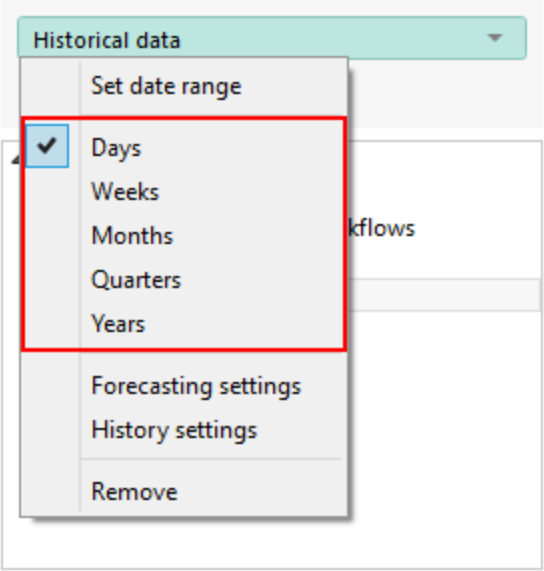
Historical data is only valid in the first dimension slot. When specified, historical data causes the chosen measures to be sampled once each night. The chart will now become a time series showing you the value of the chosen measures at each sampled point in time, including their current values.

The historical data dimension allows you to specify a time range from which to display results. This can be specified as either an exact range (e.g. 2014-01-10 to 2014-02-10) or the last X days, weeks, months, quarters or years.

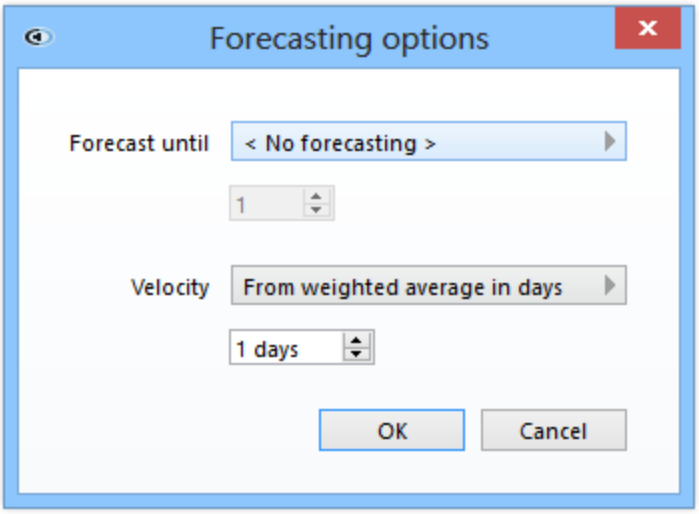
Click the historical data dimension to view it's dropdown options. Select **Set date range** to bring up this dialog:



You can also specify a quantization for the displayed data. This allows you to view data aggregated into days, weeks, months, quarters or years.

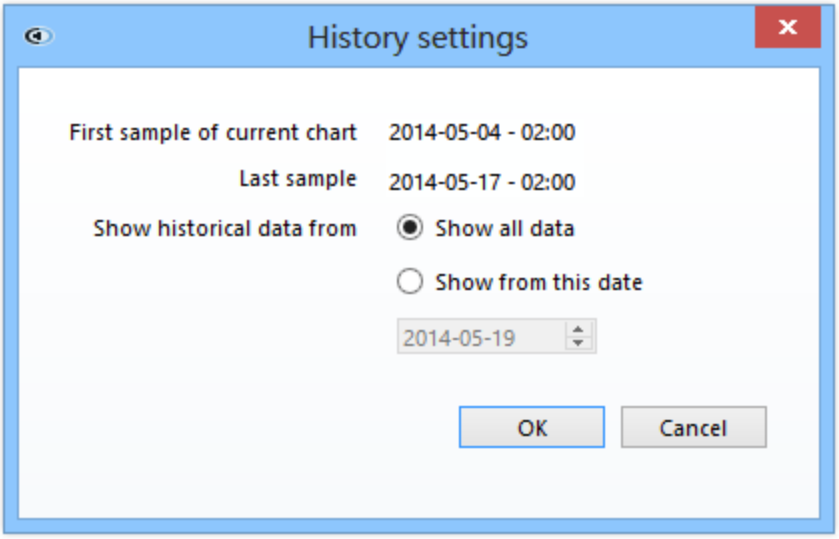


Forecasting can be used to show a prediction of measure values for some time period in the future:



Forecasting can be calculated either from a weighted average over a specified number of days or by using a user supplied velocity value.

Sampled data before a given time can be ignored:



Pipelines, Kanbans and Workflows

The Pipeline, Kanban or Workflow dimensions allows you to group items by both the pipeline, kanban or workflow they have set and the individual status of the item within the pipeline, kanban or workflow. This dimension shares the same options as discrete project column dimensions (shown below).

Project columns

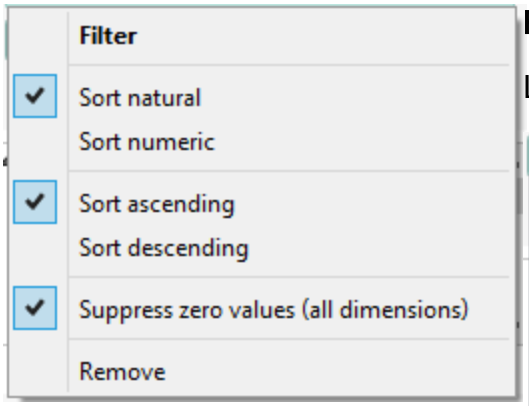
All non-numeric and non-textual columns from your projects will be available to select as dimensions, including suitable custom columns. There are three main types of project column dimensions: discrete dimensions that represent a column with discrete value choices (e.g. any drop list column), user dimensions (such as Assigned to) that represent a column holding one or more users and date dimensions that represent a column that stores a date and time (e.g. Last commented on). There are a couple of unique dimensions that are not covered by these three types and they are covered individually below.

Discrete dimensions

- **Bug priority**
- **Category**
- **Committed to sprint**
- **Confidence**
- **Item type**
- **Sprint priority**

- Milestone / release tag
- Pipeline, Kanban or Workflow
- Project
- Risk
- Severity
- Status completion
- Item type
- Drop list single and multiple choice custom columns

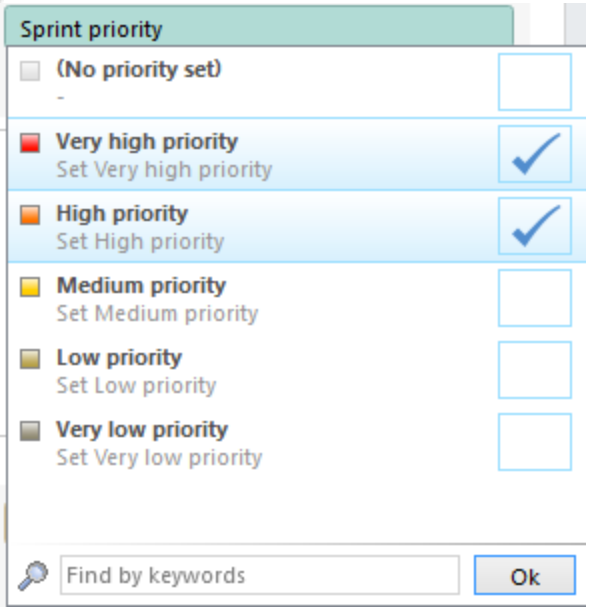
All discrete dimensions support the same basic options:



discrete dimension options

Filter

Limit the set of groups created to a specific set of values.



Sort natural

Sort dimension groups in natural order(e.g by severity, priority or alphabetic order depending on the dimension type).

Sort numeric

Sort dimension groups by numerical value.

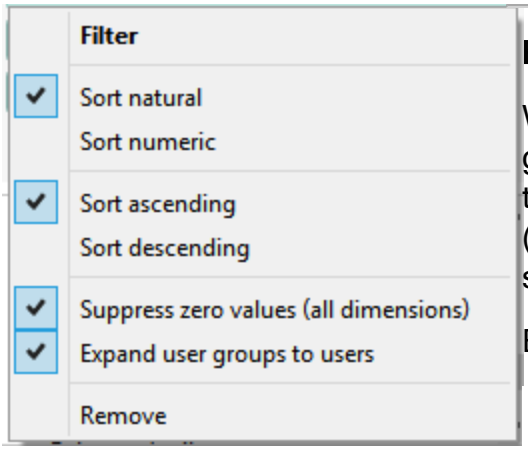
Sort ascending/descending

By choosing descending you will reverse the sorting order for each group included in the selected dimension.

User dimensions

- **Assigned to**
- **CC new comments to**
- **Originally created by**
- **People custom columns**

User dimensions share the same options as discrete dimensions but they add an additional option:



User dimension options

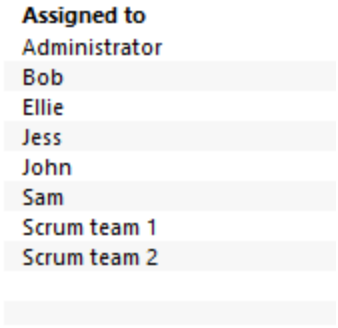
Expand user groups to users

When a user column references a user it by default also references all groups that the user is a member of. By default "Expand users groups to users" is enabled which causes these groups to be expanded (replaced) by their individual members. To include the groups themselves in the results disable this option.

Example:

Assigned to
Administrator
Bob
Ellie
Jess
John
Sam

Expand user groups to users enabled

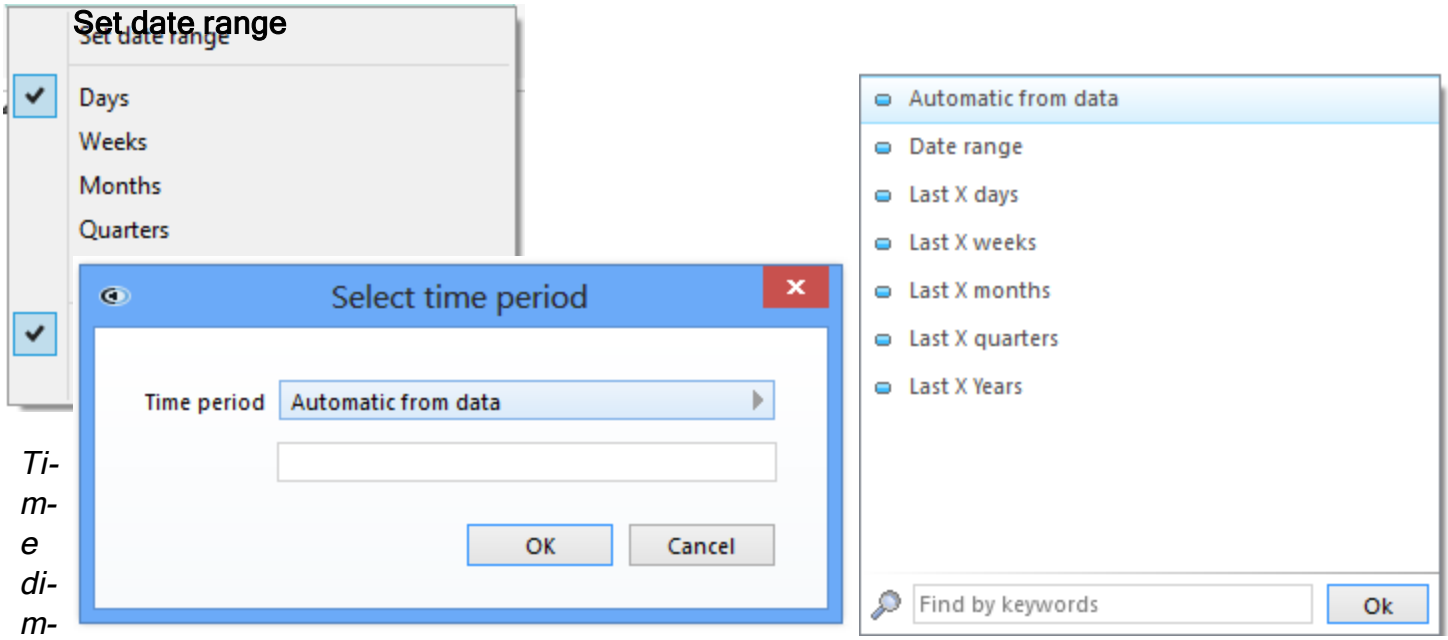


Expand user groups to users disabled

Time dimensions

- **Finish**
- **Last commented on**
- **Last read comments**
- **Last updated on**
- **Start**
- **Originally created on**
- **Date and Date and time custom columns**

Time dimensions allow you to group items by the date stored in the column and aggregate in different ways.



Time dim-

e- Set the range for the dates that you want included. This can be automatically calculated from the data, an e

n-

si- **Days, Weeks ,Months, Quarters or Years**

o-

n View data quantitized/aggregated into days, weeks, months, quarters or years.

o-

pt- **Suppress zero values**

io-

n- Removes all values that are either 0 or Null. This setting will affect all dimensions in your chart.

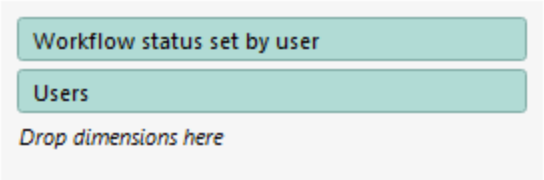
s

Other dimensions

- Workflow status set by user
- Workflow status set on date

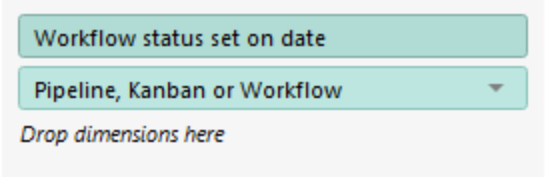
Workflow status set by user

Workflow status set by user works similarly to the Pipeline, Kanban or Workflow discrete dimension. However Workflow status set by user allows you to group by both workflow status and the last user to have set that status. For this to work you are required to have both the workflow status set by user dimension and a user dimension (e.g Users or User groups). By default Workflow status set by user does not include any workflow statuses so it is important to select filter and specify which workflows you are interested in seeing.



Workflow status set on date dimension

Workflow status set on date allows you to group by the time at which a chosen workflow status was last set. For this to work you are required to match it with a Pipeline, Kanban or Workflow dimension.



The workflow status set on date dimension uses the same options as a time project column. The paired Pipeline, Kanban or Workflow dimension allows you to include only workflow statuses you are interested in.

Projects

The projects dimension allows you to group by the project an item is a member of. It has the same options as discrete project column dimension.

Releases / Milestones

The Releases / Milestones dimension allows you to group by the release / milestone an item is a member of. It has the same options as discrete project column dimension.

Sprints / Iterations

The Sprints / Iterations dimension allows you to group by the sprint an item is a member of. It has the same options as discrete project column dimension.

User groups

The User groups dimension allows you to group items by the user groups the assigned user is a member of.

It can be combined with the Workflow status set by user column.

Users

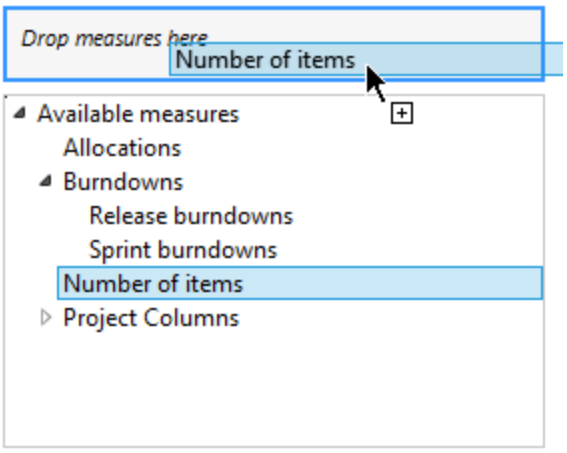
The Users dimension allows you to group items by the users assigned to them.

It can be combined with the Workflow status set by user column.

Using measures

Measures are used to specify which item values you are interested in measuring.

Measures are selected by dragging a measure from the list of available measures up to the active measure area:

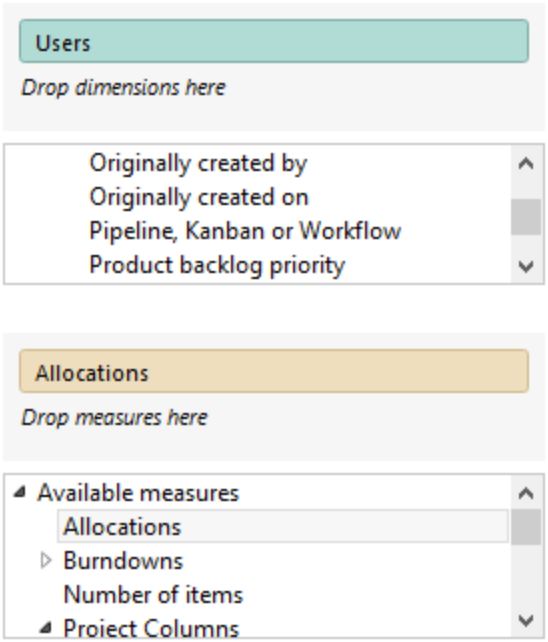


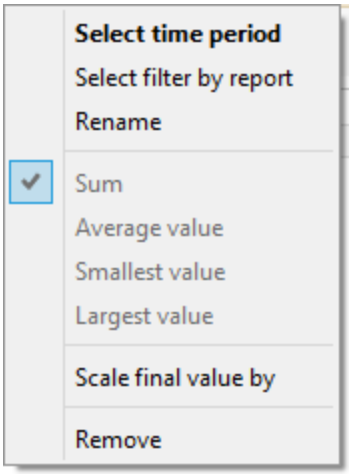
Measure Types

- Allocations
- Burndowns
- Number of items
- Project columns

Allocations

The allocations measure measures the allocated or free time for a user over some period of time. For this to work there must be a user dimension present in the chart.





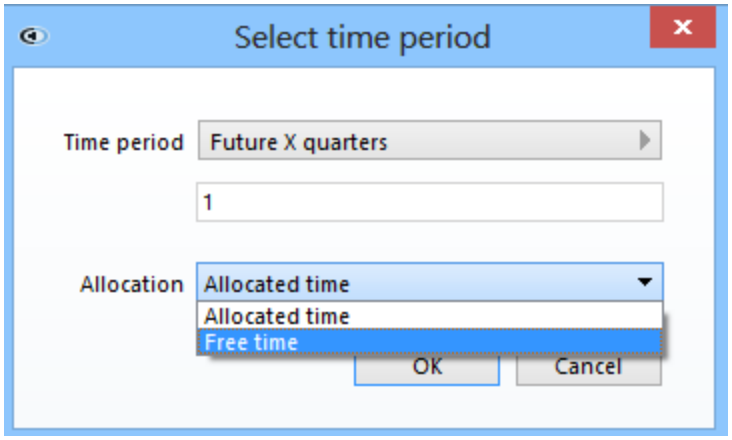
Allocation measure options

Select time period

Here you can set the time period which you are interested in and whether you are interested in allocated time or free time.

The allocated time for a user is the number of hours allocated to that user in the chosen time period, only considering tasks that passed the chart and measure filter.

The free time for a user is the total available time the user has during the chosen time period minus any scheduled tasks that do not pass the chart and measure filter. This should be thought of as the time the user has available to work on tasks passing the chart and measure filter.



Select filter by report

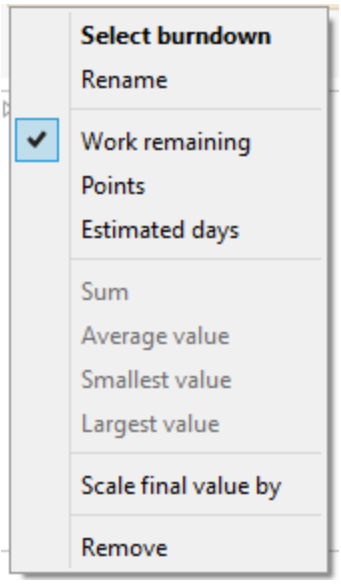
Add a report to your measure in order to filter out specific items.

Scale final value by

Lets you multiply the measure value.

Burndowns

Sprint and release burndown data is available via the Release and Sprint burndown dimensions. Since burndown data is recorded over time the historical data dimension is required for burndown dimensions to work. You can use the historical data dimension to control the date range and quantization of the displayed burndown data.



Burndown measure options

Select burndown

Choose which burndowns to include in the measure.

Work remaining, Points and Estimated days

Select the type of burndown.

Scale final value by

Lets you multiply the measure value.

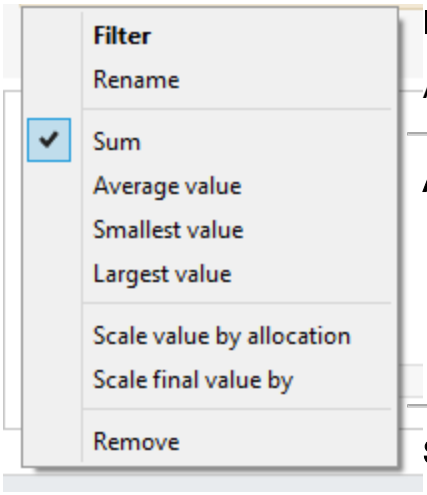
Number of items

The number of items dimension counts the number of items in each group.

Project columns

- Budgeted work
- Duration
- Earned value
- Estimated days
- Estimated days Not done
- Points
- Points Not done
- Work remaining
- Number, Number with decimals or Time spent custom columns

All project column measures share the same set of options:



Project column measure options

Filter

Add a report to your measure in order to filter out specific items.

Aggregation options

- Sum
- Average value
- Smallest value
- Largest value

Scale value by allocation

This allows your chart to take allocation percentage into account when measuring work remaining.

Scale final value by

Lets you multiply the measure value.

Different chart types

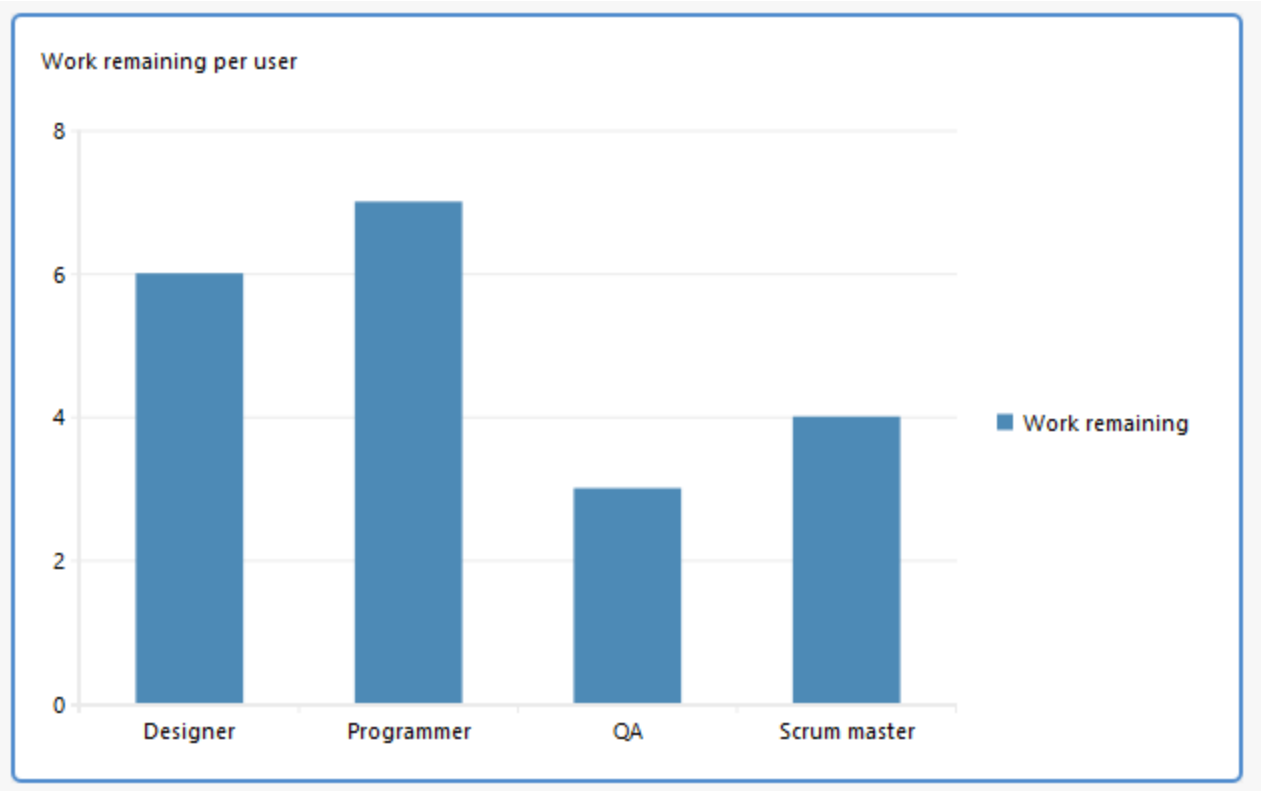
There are seven chart types to choose from when editing a chart:

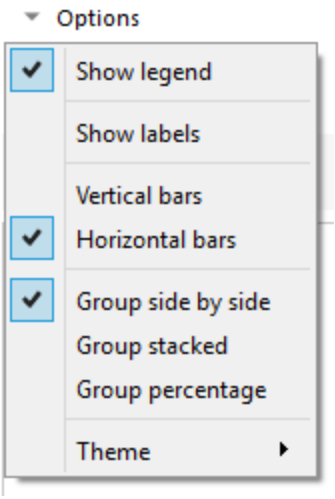
Bar
Pie
Line
Area
XY
Gauge
Table

Each chart type has specific options that can be set by clicking on the Options menu.

Bar chart

A bar chart supports up to two dimensions and any number of measures.





Legend

Show/hide the variable names included in your chart.

Labels

Show/hide value labels for each bar.

Vertical and Horizontal bars

Alternate between a vertical and a horizontal bar.

Grouping

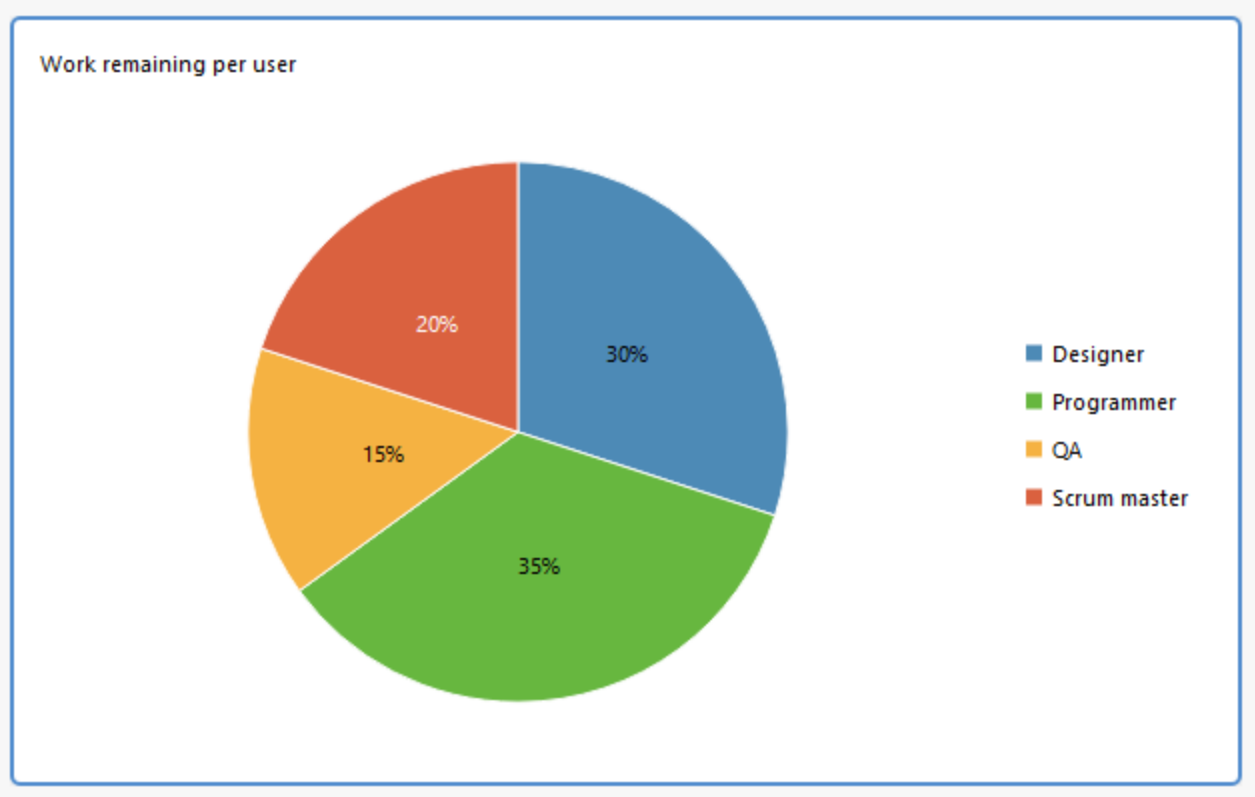
- Side by side
- Stacked
- Percentage

Theme

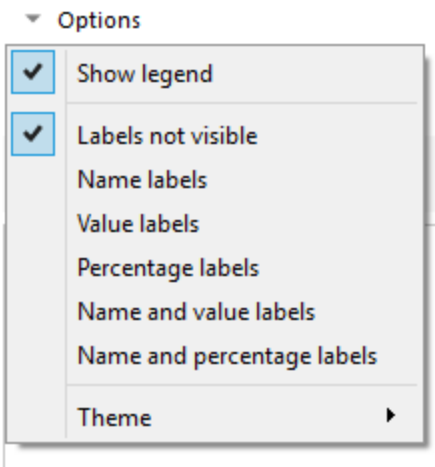
Specify color theme overriding page theme for this chart.

Pie chart

A pie chart supports up to three dimensions and uses the first measure.



Note: Pie chart labels will be dropped if they do not fit within their pie slice.



Legend

Show/hide the variable names included in your chart.

Labels

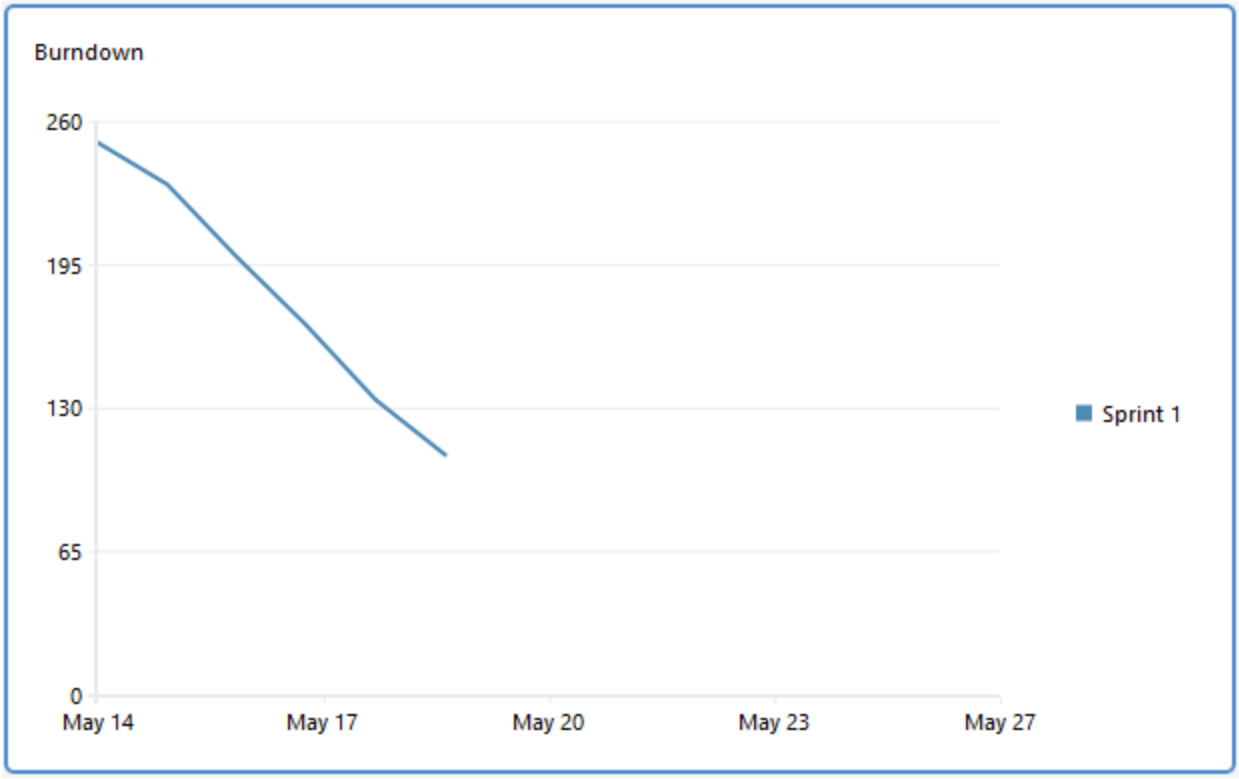
There are several different label alternatives for your pie chart.

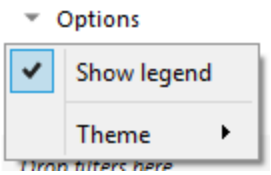
Theme

Specify color theme overriding page theme for this chart.

Line chart

A line chart requires a time dimension as the first dimension and supports up to three additional dimensions. Any number of measures can be used.





Legend

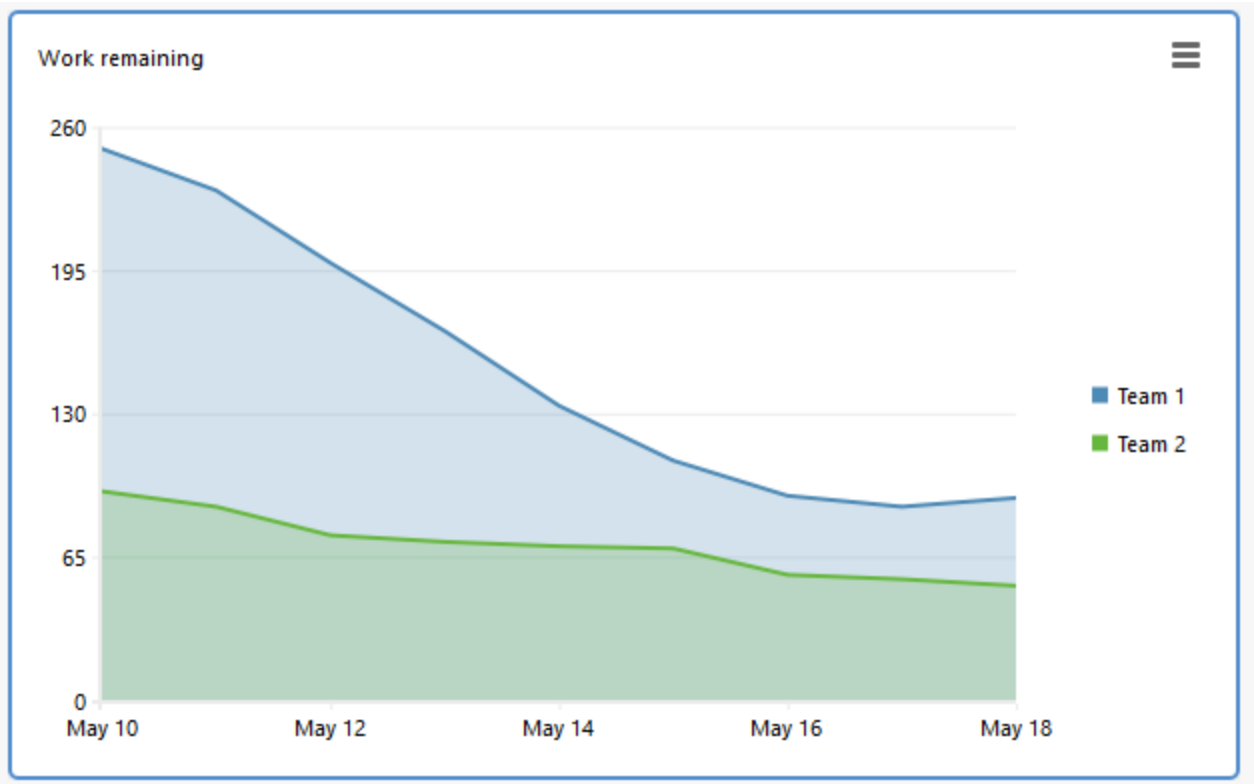
Show/hide the variable names included in your chart.

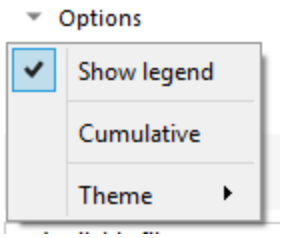
Theme

Specify color theme overriding page theme for this chart.

Area chart

An area chart requires a time dimension as the first dimension and supports up to three additional dimensions. Any number of measures can be used.





Legend

Show/hide the variable names included in your chart.

Cumulative

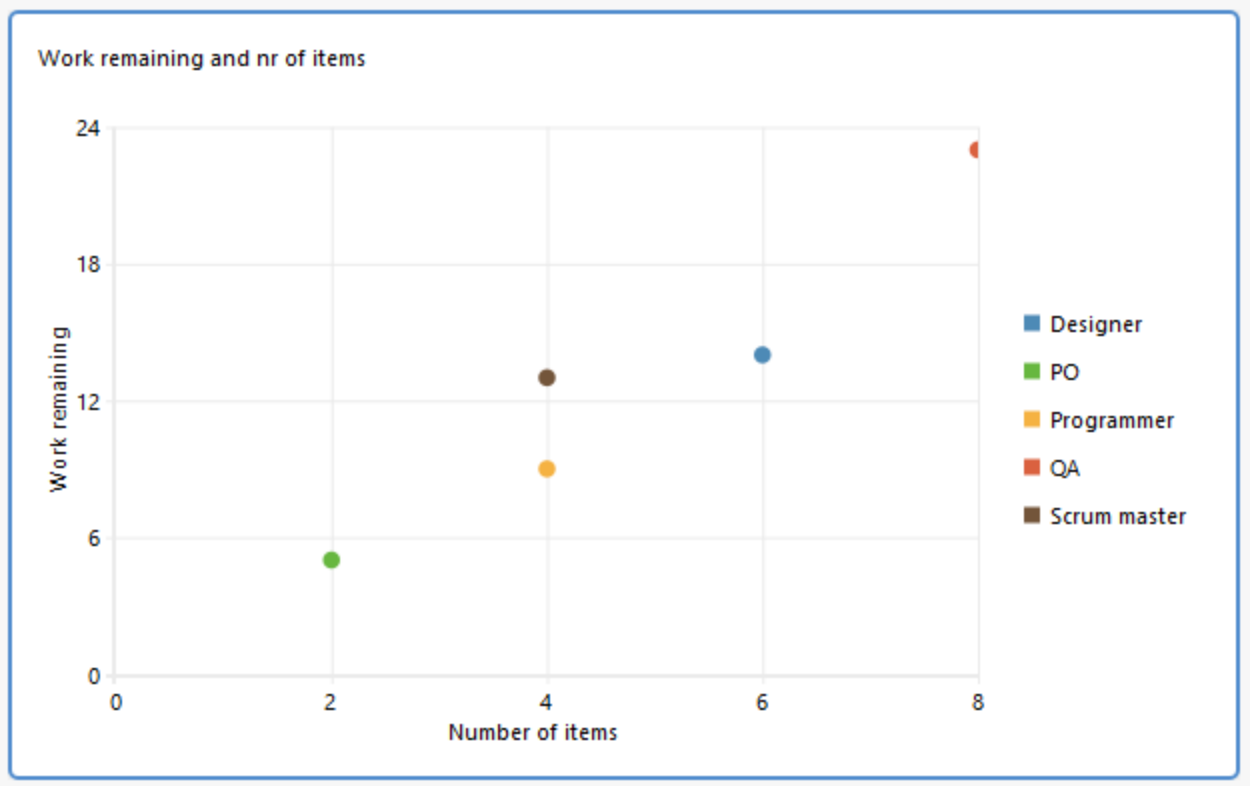
The **Cumulative** option allows you to stack graphs onto each other.

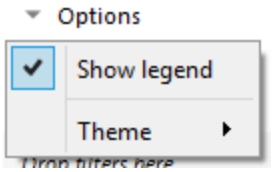
Theme

Specify color theme overriding page theme for this chart.

XY chart

A XY chart requires two measures. The first is used as the X axis, the second as the Y axis. Up to three dimensions can be used.





Legend

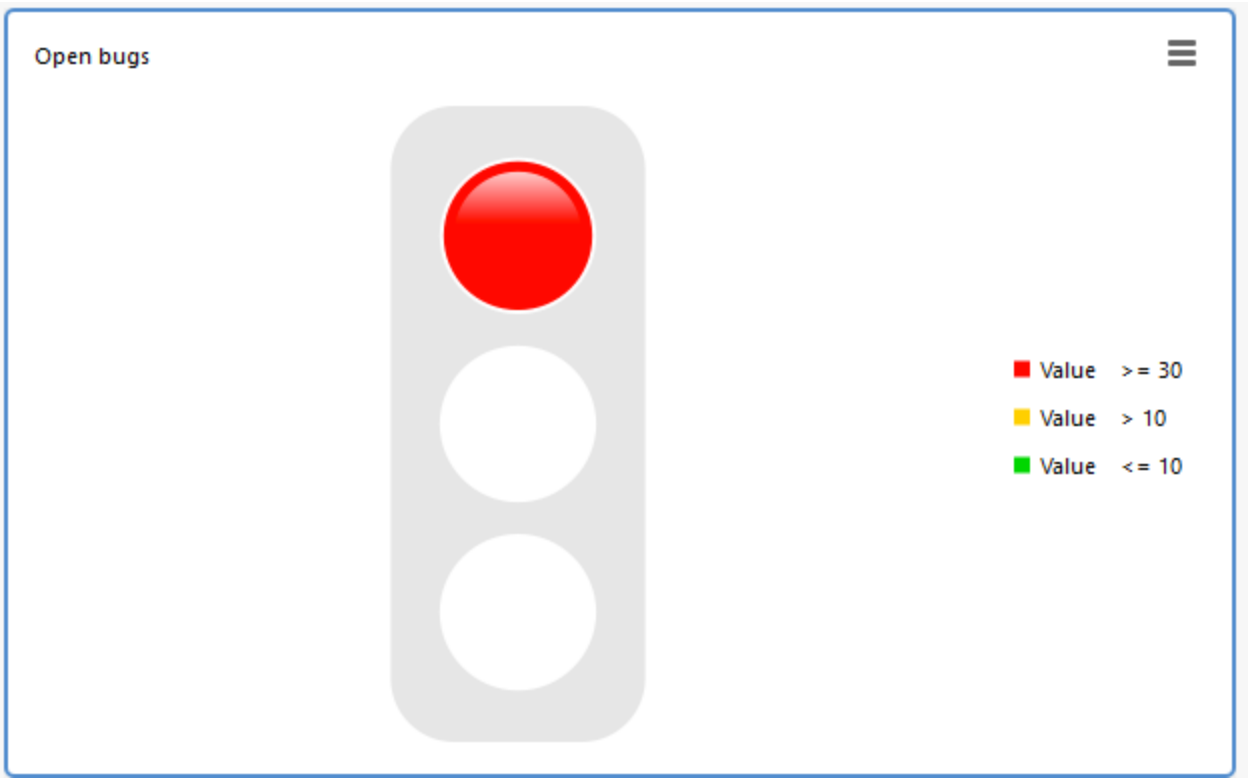
Show/hide the variable names included in your chart.

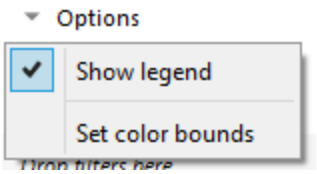
Theme

Specify color theme overriding page theme for this chart.

Gauge chart

A gauge requires one measure. Additional measures are ignored. If one or more dimensions are specified the value from the first row (when viewed as a table) is used by the gauge. You can use dimensions filters to control what exact value a gauge operates on.





Legend

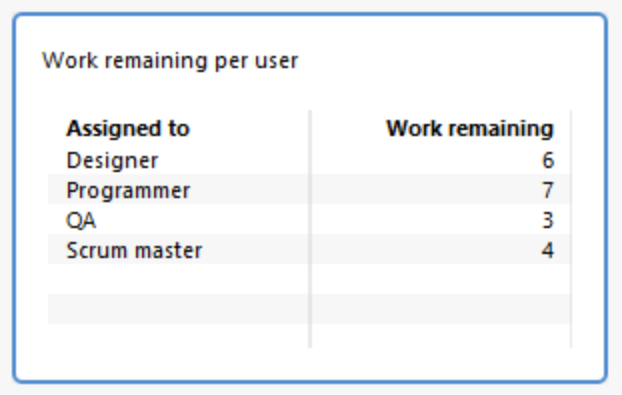
Show/hide the variable names included in your chart.

Color bounds

Specify when the gauge light changes color.

Table chart

A table supports up to three dimensions and any number of measures.



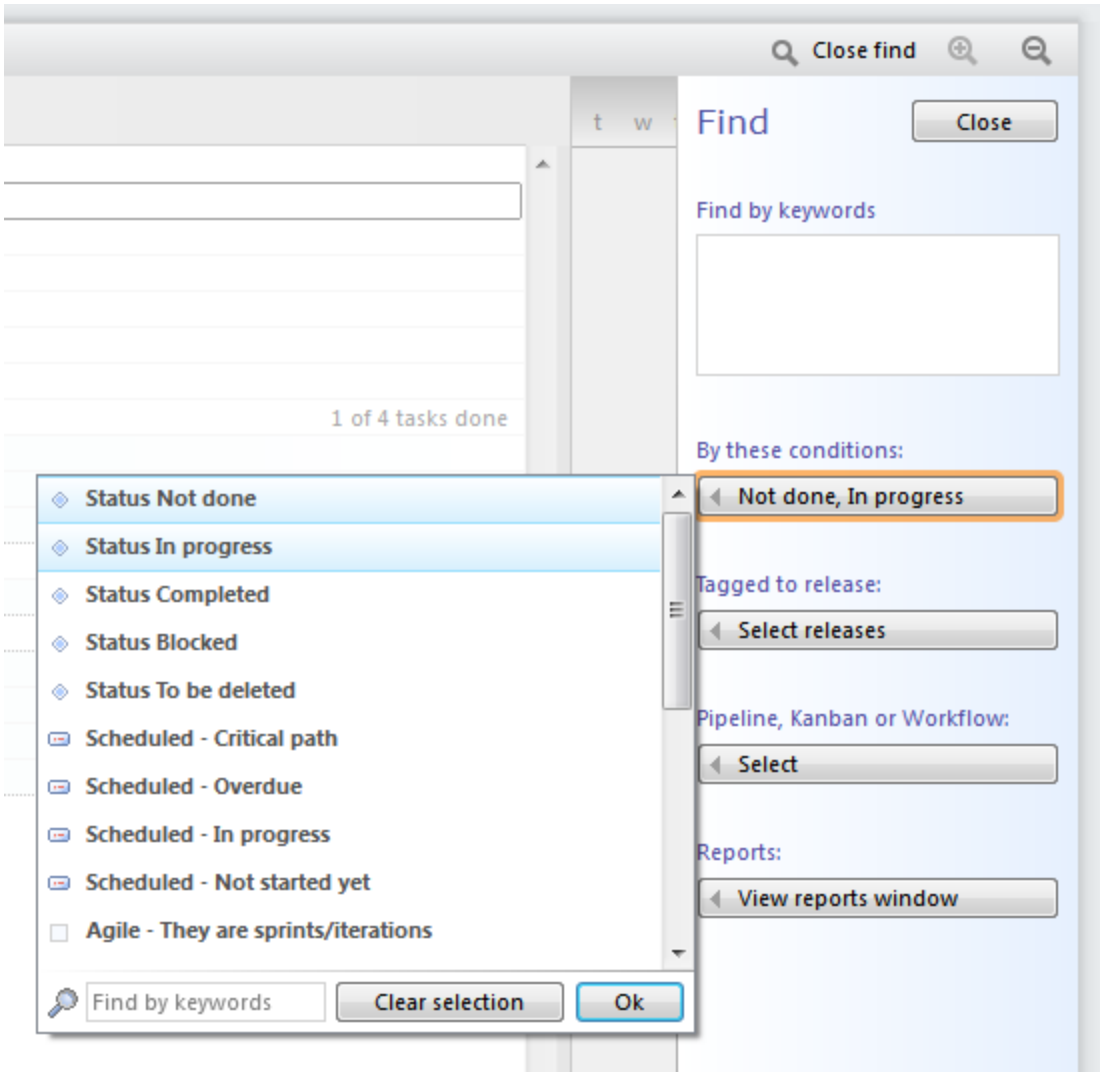
*No options available.

Using Find

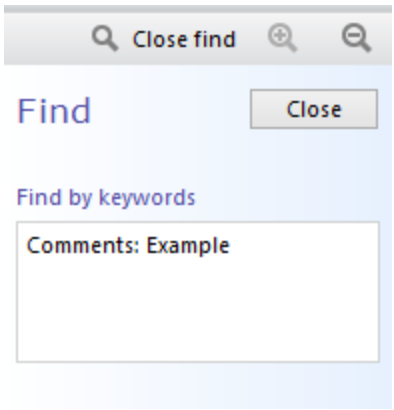
Tip: For more details on how to write find queries, go to the chapter Find query language.

Click on Find on the toolbar or press Ctrl + F (Cmd + F) to open the Find window.

Items can be filtered by a variety of conditions. Beyond simple keyword searches, the Find window can also filter items by pre-defined conditions such as item type or item status. In addition, the Find window can show only items assigned to a particular release, that have a certain workflow or are part of a specific pipeline. Finally, a pre-made report can be invoked.

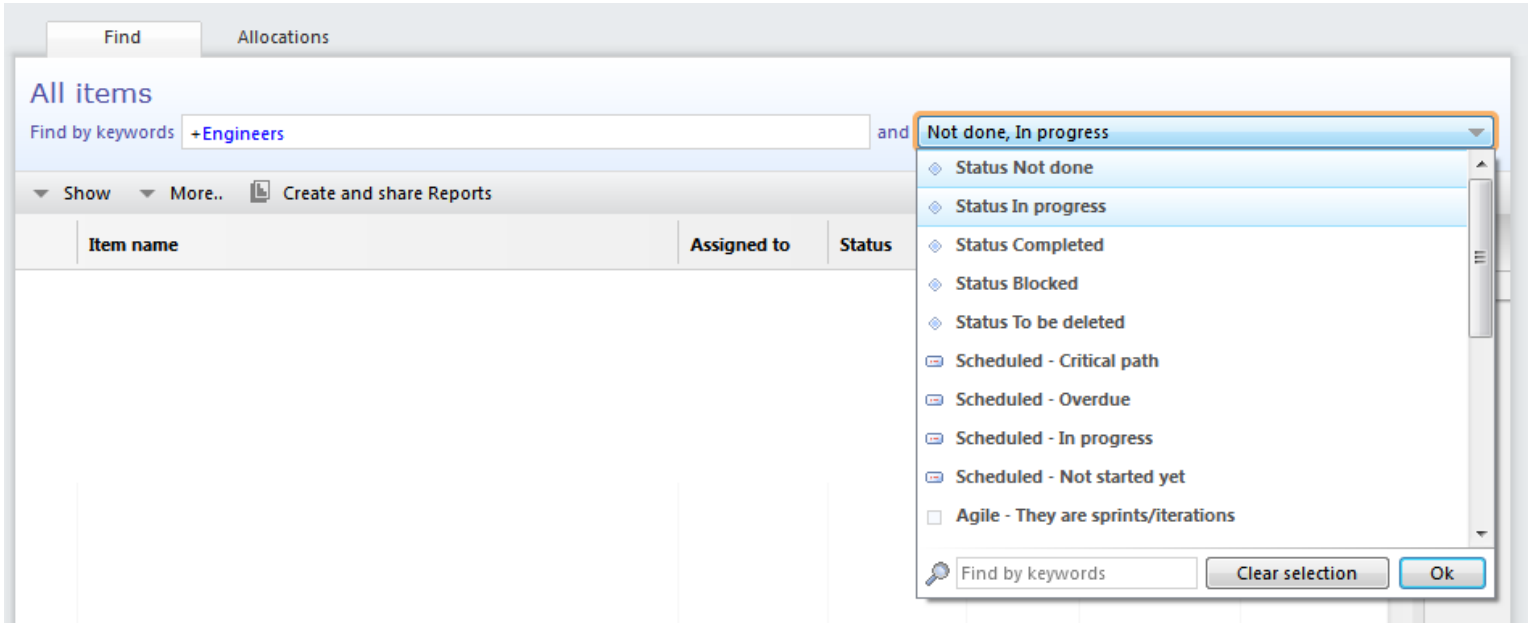


In order to search through comments you will need to add **"Comments:"** before the search string.



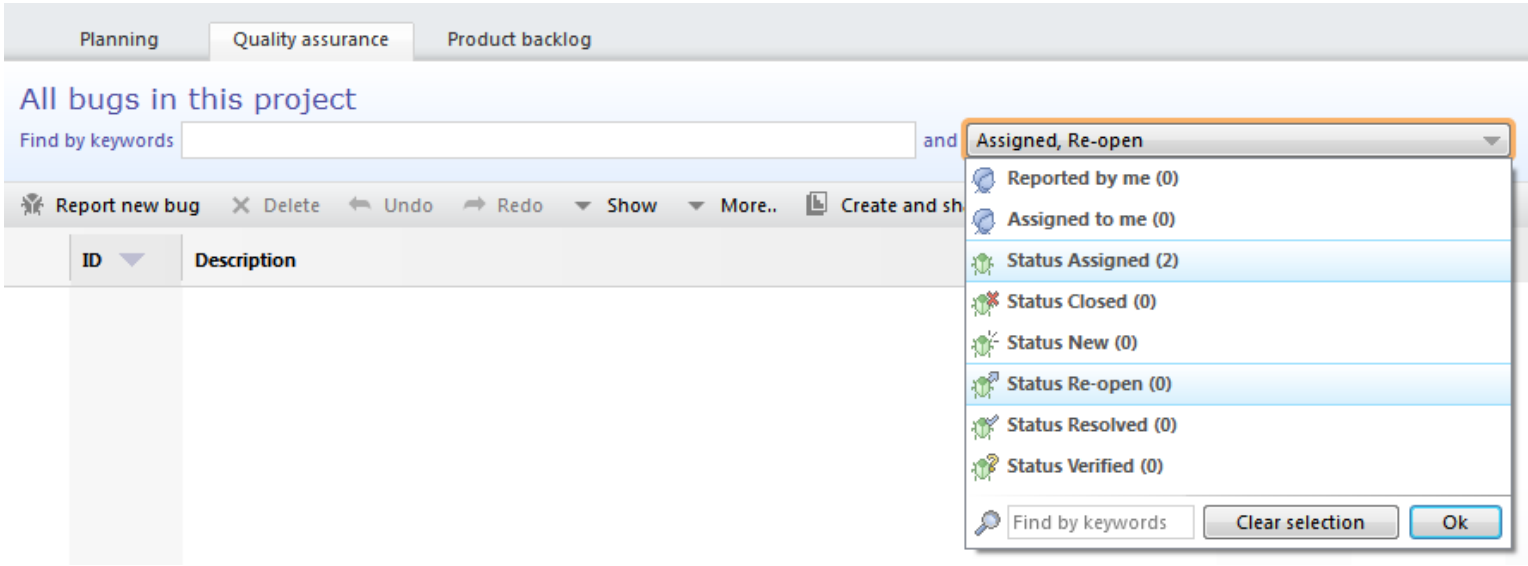
Finding items and tasks in Portfolio find

Find by keywords and select pre-defined conditions. All projects that you are connected to are instantly searched through (this does not include bugs).



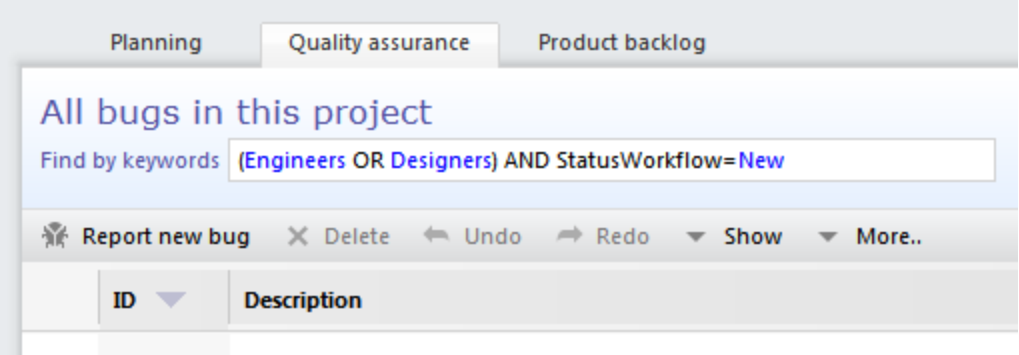
Finding bugs

Find by keywords and select bug statuses and pre-defined conditions.



The Find query language

Hansoft has an extensive language for writing queries. This way of writing queries is available everywhere you can find items, tasks, bugs or other things in Hansoft.



In the report tool you can model your queries in a visual query builder.

Find query language format

Parenthesis ()

(Programmers OR Artists) AND (BugStatus ="New" OR BugStatus ="Assigned")

AND (alternatively +).

(BugStatus = "New" AND WorkRemaining >= 5)

OR

BugStatus ="New" OR BugStatus = "Assigned"

NOT (alternatively !)

NOT BugStatus = "Verified"

- (a combination of AND and NOT)

BugStatus = "New" AND NOT WorkRemaining >= 5

BugStatus = "New" -WorkRemaining >= 5

Finding data in a column

If you write the name of a column before the keyword separated with an operator (such as : which means contains) you can find data only confined within that column.

Description:Code

BugStatus = "New"

Operators and syntax

An operator is written between a column and a keyword. A common operator is : which means contains, for example description:code (result will be all items with a description which contains the keyword code).

Text columns

When finding data in a text column (such as Description), these are the most important operators:

Contains	:
Starts with	=>
Exactly matches	=

Description:Code means all items that contains the text Code.

User columns

When finding data in a user column (such as Users or CC new comments to), these are the most important operators:

Any of selected	:
None of selected	!:
All of selected, no other	=
At least all of selected	<=

users:"Example Team User" means an item where one of the assigned users are Example Team User.

Date columns

When finding data in a date column (such as Start, Finish, a custom date column, last commented on or last updated on), these are the most important operators:

On date	=
After date	>
Before date	<
On or after date	>=
On or before date	<=
Contains	:

start >= 2009-10-01 means start is on or after the October 1st 2009.

Please note that dates has to be written in standard ISO 8601 standard format YYYY-MM-DD. This is because queries written in plain text should not be dependent on local date formatting settings.

Other columns

Finding data in any other column (such as numeric column Work Remaining), at least these operators are available:

Equals to	=
Greater than	>
Less than	<
Greater than equal	>=
Less than equal	<=
Contains	:

Example: workremaining >= 15 means work remaining on agile items are greater than or equal to 15 hours.

Special keywords

mywork and assignedtome gives all work assigned to the logged in user using the keyword

weekX (for example week15 week17) find items that are scheduled during those weeks

fromdatetodate(2008-01-01, 2010-01-01) find dates in the specified range in all columns were it can be applied. Can be combined with now formatting, fromdatetodate(now-15d, now+25d).

Assignedto:Resource("Programmers") finds all items where any column has a member of the user group as value

projects (only in Portfolio find and the To do list, for example "Product Alpha") finds all items within the specified project

Examples

In a scheduling project

(Start >= 2009-03-02 AND Start <= 2009-03-31) AND (Itemname: code OR Itemname: art)

In a agile project

(Itemstatus= "Not done" OR Itemstatus= "In progress") AND
(Workremaining >= 1 AND Workremaining <= 10)

In a quality assurance project

(Bugstatus= Assigned OR Bugstatus= New OR Bugstatus= "Re-open") AND
(Severity= "Severity A" OR Severity= "Severity B")

Getting started with the Find functionality

Useful reports

- As a scrum master I want to find items that are currently in a blocked status so that I can help my team clear out Problems.
- As a scrum master I want to find items that are currently blocking some other item in the project so that we can focus our efforts on those things.
- As a scrum master I want to see the todo-list of all my team members. I want them to grouped by person and ordered by sprint priority. I don't want to see completed work.
- As a project manager in a scheduling project I want to see the todo-list of all my team members. I don't want to see completed work.
- As a product owner, I would like to know the status of a work package tagged to a specific release and get an overview of what user stories/functionality risk falling out of the release so that I can make corrective actions as early as possible.
- As a project manager I want to find all work that hasn't been assigned to anyone or has no work remaining set so that we can tidy up after the sprint planning.
- As a product owner I would like to see all the user stories in the backlog that contains a certain user role that are not completed.
- As a product owner I want to see the remaining workload in the ongoing sprints so that I can get a feeling if the sprints will be successful or not.

Team impediments

Problem:

As a scrum master I want to find items that are currently in a blocked status so that I can help my team clear out Problems.

Query string:

Statuscompletion= Blocked AND Itemtype= "Backlog item" AND Assignedto:Resource()

Instructions:

This report would typically exist in the project schedule.

In the box “Assigned to” you should select the team members or groups you want to see blocked items for. If you want to see all blocked items in a project you can delete that box.

I would group the report the report by “Assigned to” so that the blocked items are grouped by person that owns it currently.

What are we blocking?

Problem:

As a scrum master I want to find items that are currently blocking some other item in the project so that we can focus our efforts on those things.

Query string:

Assignedto:Resource() AND Linkedtoitem=>Text(Blocked)

Instructions:

This report would typically exist in the project schedule, but it could also exist in the QA section to list bugs that are currently blocking development progress.

For this report to work the team must use the “Linked to item” in combination with blocked status to signal a dependency between items.

In the box “Assigned to” you should select the team members or groups that you are interested in seeing if they have any blocking items. If you want to see all blocking items in a project you can delete that box.

I see two options for grouping, either you group by person that owns it to find out who to talk to or you would group them by “Linked to item” to see all items that blocking a specific item.

Team's ToDo list

Problem:

As a scum master I want to see the todo-list of all my team members. I want them to grouped by person and ordered by sprint priority. I don't want to see completed work.

Query string:

GeneralconditionOngoingwork = true AND Assignedto:Resource() AND !Statuscompletion= Completed

Instructions:

This report would exist in the project schedule.

In the box “Assigned to” you should select the team members or groups you want to see the todo-list for. If you want to see all todo lists in a project you can delete that box.

The report should first be grouped by “Assigned to”, then by "Commited to sprint" and sorted by sprint priority.

Team's schedule task list

Problem:

As a project manager in a scheduling project I want to see the todo-list of all my team members. I don't want to see completed work.

Query string:

(Statuscompletion= "Not done" OR Statuscompletion= "In progress" OR Statuscompletion= Blocked) AND Assignedto:Resource() AND Itemtype= "Scheduled task"

Instructions:

This report would exist in the project schedule.

In the box “Assigned to” you should select the team members or groups you want to see the todo-list for. If you want to see all todo lists in a project you can delete that box.

The report should first be grouped by “Assigned to" and sorted by "Start".

Release status

Problem:

As a product owner, I would like to know the status of a work package tagged to a specific release and get an overview of what user stories/functionality risk falling out of the release so that I can make corrective actions as early as possible.

Query string

Releasetag:Item(420637)

Instructions:

This report is created in the product backlog. Prerequisites for the backlog set-up is that all user stories meant for the release/milestone carry the relevant release/milestone and that their backlog priority is defined.

For this report, you will only have to create one find criteria. The find criteria should search for "release/milestone tag" and you need to specify the relevant release/milestone. You then group the report by status and sort the results by product backlog priority.

Incomplete planning

Problem:

As a project manager I want to find all work that haven't been assigned to anyone or has no work remaining set so that we can tidy up after the sprint planning.

Query string:

Assignedto=Resource() AND !Statuscompletion= Completed OR Workremaining < 0.00 AND !Statuscompletion= Completed

Instructions:

This report would exist in the project schedule.

Typically you wouldn't sort or group this report.

Find user stories targeted towards a certain user role

Problem:

As a product owner I would like to see all the user stories in the backlog that contains a certain user role that are not completed.

Query string:

Userstory:Text([i]user role[/i]) AND !Statuscompletion= Completed

Instructions:

If you are working very heavily with user roles this report can be helpful to find the remaining of all the user stories for a certain user role.

If you include completed items it might be a good idea to group the output according to status.

Remaining workload

Problem:

As a product owner I want to see the remaining workload in the ongoing sprints so that I can get a feeling if the sprints will be successful or not.

Query string:

GeneralconditionOngoingwork = true AND !Statuscompletion= Completed

Instructions:

This report would exist in the project schedule and you would group the output by person. Since the only thing we are interested in is work remaining it might be an idea to select work remaining as the only visible column.

All columns, types and operators

This is a guide describing how to use the find query language together with all columns, types and operators in Hansoft.

All columns in Hansoft have an ideal type associated with it. For example, both column Work remaining and Earned Value have the type Hours. Detailed description, Item name and Comments have the type Text.

The type describes how to use find on a column and it also specifies how the operators work.

Keywords and parameters can be explicitly typed. This means that when Hansoft evaluates the find query it will override the type that would otherwise have been assigned to the keyword or parameter. For example you might want to explicitly type a keyword to Text to avoid it only finding items assigned to a user with the same name you want to search for as text in other fields.

Note: You can view the query syntax associated with each column in the report editor.

All columns

Column name	Type	Example	Result
Assign tag	Resource	Assigntag:Resource(<Resource>)	Find items for which the "Assign tag" column contains the resource <Resource>
Assigned to	Resource	Assignedto:Resource(<Resource>)	Find items for which the "Assigned to" column contains the resource <Resource>
Budgeted work	Hours	Budgetedwork= <Hours>	Find items for which the "Budgeted work" column contains the value <Hours> *Budgeted work is only accessible in Task scheduling mode
Bug priority	Number	Bugpriority= <Number> or <Priority>	Find bugs for which the "Bug status" column contains the bug priority <Bug status> *Only works in QA view
Category	Backlog category	Category= <Backlog category>	Find items for which the "Category" column contains the category <Backlog category>
CC new comments to	Resource	CCnewcommentsto:Resource (<Resource>)	Find items for which the "CC new comments to" column contains the resource <Resource>
Comments	Text	Comments:Text(<Text>)	Finds items containing <Text> in the comment section
Committed to sprint	Item	Committedtosprint:Item(<Item>)	Finds items for which the "Committed to sprint" column contains <Item>
Confidence	Confidence	Confidence= <Confidence>	Finds items for which the "Confidence"

			column contains <Confidence> Finds items for which "MyColumn" contains <Time> *MyColumn is a custom column
Custom column date	Time	MyColumn= <Time>	
Custom column drop list	Custom column drop list	MyColumn= <CustomColumnDroplist>	Find items for which "MyColumn" contains the droplist choice <CustomColumnDroplist> *MyColumn is a custom column
Custom column hyperlink	Text	MyColumn:<Text>	Find items for which "MyColumn" contains the text <Text> *MyColumn is a custom column
Custom column multi line text	Text	MyColumn:<Text>	Find items for which "MyColumn" contains the text <Text> *MyColumn is a custom column
Custom column number	Number	Mycolumn:<Number>	Find items for which "MyColumn" contains the number <Number> *MyColumn is a custom column
Custom column users	Resource	MyColumn:<Resource>	Find items for which "MyColumn" contains the resource <Resource> *MyColumn is a custom column
Custom column text	Text	MyColumn:<Text>	Find items for which "MyColumn" contains the text <Text>

Database ID	Number	DatabaseID= <Number>	*MyColumn is a custom column Find items for which "MyColumn" contains the number <Number>
Detailed description	Text	Detaileddescription:Text(<Text>)	*MyColumn is a custom column Find bugs for which the "Detailed description" column contains <Text>
Duration	Days	Duration= <Days>	*Only works in QA view Find items for which the Duration column contains a value equal to <Days>
Earned value	Hours	Earnedvalue= <Hours>	Find items for which the "Earned value" column contains <Item> *Earned value is an additional module that can be activated for free
Estimated ideal days	Days	Estimateddays= <Days>	Find items for which the "Estimated ideal days" column contains a value equal to <Days>
Finish	Time	Finish= <Time>	Find items for which the "Finish" column contains the date <Time> *Only in Task scheduling projects
General condition - Archived	Boolean	GeneralconditionArchived= true	Find archived items
General condition - Assigned to me	Boolean	GeneralconditionAssignedtome= true	Find items assigned to me
General condition - Has sub items	Boolean	GeneralconditionHassubitems= true	Will match items that have sub items, i.e.,

			they are parents
General condition - Milestone overdue	Boolean	GeneralconditionReleaseoverdue= true	Find items that are overdue their respective release date
General condition - Not assigned	Boolean	GeneralconditionNotassigned= true	Find items that are not assigned
General condition - Out of office task	Boolean	GeneralconditionOutofofficetask= true	Find items that have been set to out of office tasks
General condition - Ongoing work	Boolean	GeneralconditionOngoingwork= true	Find items that have not been set to status completed
General condition - User story	Boolean	GeneralconditionUserstory= true	Find items that have an attached user story
Hyperlink	Text	Hyperlink:Text(<Text>)	Find items for which the "Hyperlink" column contains the text <Text>
ID	Number	ID= <Number>	Find items for which the "ID" column contains a value equal to <Number> *(The item ID can be seen by activating the ID column) *(Items receive their ID from the order in which they were created)
Immediate parent sub projects	Item	Immediateparentsubproject:Item (<Item>)	Find <Item>s immediate sub project(s)
Immediate sub items	Item	Immediatesubitems:Item(<Item>)	Will match items that have a set of direct sub-items that matches the specified set of items
Item name / description / activity name	Text	Itemname:Text(<Text>)	Find items for which the "Item name" column contains the text <Text>
Status completion	Item status	Statuscompletion= <Item status>	Find items for which the "Status completion" column contains the item status <Item

			status> Find items for which the "Status" column contains the item status <Item status> *Only works in QA view
Status workflow	Item status	Statusorkflow= <Item status>	
Item type	Item type	Itemtype= <Item type>	Find items of the type <Item type>
Last commented on	Time	Lastcommentedon= <Time>	Find items for which the "Last commented on" column contains the date <Time>
Last updated on	Time	Lastupdatedon= <Time>	Find items for which the "Last updated on" column contains the date <Time>
Leaf sub items	Item	Leafsubitems:Item(<Item>)	Will match items that have a set of leaf sub-items recursively (i.e., they do not have any children in their turn) that matches the specified set of items
Linked to item	Item	Linkedtoitem:Text(<Item>)	Find items for which the "Linked to item" column contains the item <Item>
Milestone / release tag	Text	Releasetag:<Text>	Find items for which the "Release tag" column contains the item status <Text>
Originally created / reported by	Resource	Originallycreatedby= Resource (<Resource>)	Find items for which the "Originally created by" column contains the resource <Resource>
Parent sub projects	Item	Parentsubprojects:Item(<Item>)	Will match items that have a parent set that matches the specified set of items
Pipelines & workflows	Workflow / pipeline and status	PipelineKanbanorWorkflow= MyPipeline	Find items that have an attached pipeline or

			workflow called MyPipeline *MyPipeline is a pipeline
Pipeline and Kanban tasks - Can start now	Boolean	PipelineandKanbantasksCanstartnow= true	Find items with a pipeline/kanaban that can be initiated *(If the entire pipeline has been completed it will not show up through this find syntax)
Points	Points	Points= <Points>	Find items for which the "Points" column contains a value equal to <Points>
Predecessor	Item	Predecessor= <Item>	Find items who have predecessor items that are called item <Item>
Project	Project	Project= <Project>	*Only in Task scheduling projects Find all projects called <Project> *Useful when attempting to filter items in the portfolio view
Risk	Risk	Risk= <Risk>	Find items for which the "Risk" column contains the risk value <Risk>
Scheduled condition - In progress	Boolean	ScheduledconditionInprogress= true	Find scheduled tasks that are currently in progress
Scheduled condition - Not started yet	Boolean	ScheduledconditionNotstartedyet= true	Find scheduled tasks that have not started yet
Scheduled condition - Overdue	Boolean	ScheduledconditionOverdue= true	Find scheduled tasks that are overdue
Sprint priority	Number	Sprintpriority= <Number> OR <Priority>	Find items for which the "Sprint priority" column

			contains a value equal to <Number>/<Priority>
Start	Time	Start= <Time>	Find items for which the "Start" column contains the date <Time> *Only in Task scheduling projects
Steps to reproduce	Text	Stepstoreproduce:Text(<Text>)	Find bugs for which the "Steps to reproduce" field contains the text <Text> *(Only works in QA view)
Sub items	Item	Subitems:Item(<Item>)	Find items that have a sub item called <Item>
Sub project path	Text	Subprojectpath:Text(<Text>)	Shows the sub project path for items containing the string <Text> within their name
Successor	Item	Successor= <Item>	Finds items who have successor items that are called <Item> *Only in Task scheduling projects
User story	Text	Userstory:Text(<Text>)	Find items for which the "User story" column contains the text <Text>
Work remaining	Hours	Workremaining= <Hours>	Find items for which the "Work remaining" column contains a value equal to <Hours>

Text type

The following operators can be used on text:

Description	Operator	Synonyms
Contains	:	
Contains case sensitive	::	
Not contains	!:	
Not contains case sensitive	!!:	

Starts with	=>
Starts with case sensitive	==>
Ends with	= <
Ends with case sensitive	== <
Equals to	=
Equals to case sensitive	==
Not equals to	!=
Not equals to case sensitive	!!=
Greater than	>
Greater than case sensitive	>>
Less than	<
Less than case sensitive	<<
Greater than equal	>=
Greater than equal case sensitive	>>=
Less than equal	<=
Less than equal case sensitive	<<=

Example

Description= Code returns all items that have a description that exactly matches Code

Explicitly typing

Text(keyword to type)

Example:

Resources:Text("john") returns all items with a resources column containing the text john

Number types

The following operators can be used on a number:

Description	Operator	Synonyms
Equals to	=	== : :: => ==> = < == <
Not equals to	!=	!!= !: !!:
Greater than	>	>>
Less than	<	<<
Greater than equal	>=	>>=
Less than equal	<=	<<=
Contains (needs explicit typing to text, see example below)	:	

Example

DatabaseID= 1193 returns the item that has Database ID 1193

DatabaseID:"11" returns items that has a Database ID which contains number 11

Explicit typing

Number

Example:

EstimatedidealdaysÂ >= 5.30

returns all items that have estimated ideal days greater than or equal to 5.30

Boolean Types

Boolean columns can either be of value true (represented by number 1) or false (represented by number 0).

The following operators are ideally used on columns typed as boolean:

Equals to	=
Not equals to	!=

Since the Boolean column returns a number, the operators for the Number type can also be used.

Example

ScheduledconditionInprogress= 1 returns all scheduled tasks that are currently in progress

Explicitly typing

true or false

Example:

ScheduledconditionOverdue= true

returns all scheduled tasks that are overdue

Hours and Days types

Hours and days are used on columns such as Duration and Work remaining and are specified by a d for days and h for hours in the end of a number.

If you write no letter after the number Hansoft will auto type to the default type for that column (for example Duration will auto type to days if you write Duration > 5).

Days and hours can be converted between each other so you can search for example Duration > 16h and it will automatically convert the duration expressed as days to hours. The conversion always assumes 8 hour days.

Operators for use with Hours or Days type:

Since the Hours and Days are a number, the Number type operators apply.

Example

Duration > 5d returns all scheduled tasks that have a duration longer than 5 days

Explicit typing

Xd for days

Xh for hours

Example:

Work remaining <= 3.5d

returns all items that has work remaining less than or equal to three and a half days

Points type

The following operators can be used on points:

Since points are expressed as a number, the Number type operators apply.

Example

Points > 20 returns all items with more than 20 points

Explicit typing

Xpoints

Example of explicit typing

Points <= 10points returns all items with less than or equal to 10 points

Item type

The type item specifies one or several of any kind of item, task or bug in Hansoft.

Operators

Description	Operator	Synonyms

Any of items	:	::
Any of items, some other	>	>>
Any of items, no other	<	>>
None of items	!:	
None of items, some other	!!:	
All of items, no other	=	==
None of items or some other	!=	!!=
All of items, some other	>=	>>=
At least all of items	<=	<<=
First is any of items	=>	==>
Non-first are any of items	= <	== <

Example

Committedtosprint= "Email application - Prototype" returns all items committed to sprint "Email application - Prototype"

Explicit typing

Item([ST, M, BI, AT, S, SP, B]"task name", ...)

ST is a Scheduled task

M is a Milestone

BI is a Backlog item

AT is a Agile task

S is a Sprint

SP is a Sub project

B is a Bug

Example of explicit typing

Linkedtotaskitembug : Item(BI"As an application user, I can reply to emails")

returns all items linked to backlog item (BI) "As an application user, I can reply to emails"

Linkedtotaskitembug= Item(BI"As an application user, I can reply to emails")

returns all items linked to ONLY backlog item (BI) "As an application user, I can reply to emails"

Linkedtotaskitembug : Item(BI"As an application user, I can reply to emails", BI"As an application user, I can forward emails")

returns all items linked to backlog item (BI) "As an application user, I can reply to emails" or backlog item (BI) "As an application user, I can forward emails"

Resources type

The type people specifies both individual users and user groups.

The following operators can be used on people:

Description	Operator	Synonyms
Any of selected	:	::
Any of selected, some other	>	>>
Any of selected, no other	<	>>
None of selected	!:	
None of selected, some other	!!:	
All of selected, no other	=	==
None of selected or some other	!=	!!=
All of selected, some other	>=	>>=
At least all of selected	<=	<<=
First is any of selected	=>	==>
Non-first are any of selected	= <	== <

Example

assignedto = "Example Proj Manager"

returns all items that have only "Example Proj Manager" assigned

Explicit typing

R specifies individual resource and is written before the typed keyword

G specifies a resource group and is written before the typed keyword

resource([R or G]"keyword to type", [R or G]"keyword to type" etc.)

Example:

CCnewcommentsto:resource(G"Business Unit 3", R"Example Proj Manager")

returns all items that have a CC to a user in user group "Business Unit 3" or to the individual user "Example Proj Manager"

Using the currently logged in user as a resource type

loggedinresource

Example:

assignedto:Resource(loggedinresource)

Time type

The time type is used for all kinds of date columns such as Start and Last Commented on. All dates are specified in the ISO 8601 format YYYY-MM-DD.

The following operators can be used on dates and times:

Description	Operator	Synonyms
On date	=	== : :: => ==> = < == <
Not on date	!=	!!= !: !!:
After date	>	>>
Before date	<	<<
On or after date	>=	>>=
On or before date	<=	<<=

Example

Start >= 2009-10-01 returns the scheduled tasks that have a start date on or after 1st of October 2009

Explicit typing

Time

Example:

Finish <= 2009-10-05

returns the scheduled tasks that have a finish date on or before 5th of October 2009

Syntax

There are three ways to specify a date.

Gregorian date and time	YYYY-[MM[-DD]][:HH[:MM[:SS]]]
ISO week, day and time	YYYY-['W'WW-[D]][:HH[:MM[:SS]]]
Offset from the current time	Now[(+,-)X(Y,M,D,W,H,m,S)][:HH[:MM[:SS]]]

A date is recognized as such when an integer with a - after is found. You don't need to specify the whole date and time, but can stop at any precision (see below). You cannot include any white space within the date expression and thus need to write the whole date without any spaces.

When searching on dates or time the keyword now can be used (start >= now). Together with keyword now you can also add + or - and

Second	s
Minute	m
Hour	h
Day	d
Week	w
Month	M
Year	y

Example of now syntax

Start > Now-3M

returns scheduled tasks with a start date greater than three months ago.

LastUpdatedOn > Now-2h AND LastUpdatedOn <= Now

returns all items, tasks or bugs updated the last 2 hours.

Precision

When specifying a date or time it will implicitly have a precision attached to it. The precision is determined by the amount of accuracy that the date is specified with.

The precision of the time/date determines the range of time that the search sees as a match. If you for example specify a specific hour (2008-08-09:19) all times that fall within that hour will be matched in the search.

Precision examples

Syntax	Accuracy
2008-	Year
2008-08	Month
2008-08-09	Day
2008-08-09:19	Hour
2008-08-09:19:30	Minute
2008-08-09:19:30:11	Second
2008-W5	Week
2008-W5-1	Day
2008-W5-1:09	Hour

2008-W5-1:09:30	Minute
2008-W5-1:09:30:11	Second
Now	Second
Now+1y	Day
Now+1.5y	Day
Now+1M	Day
Now+1.5M	Day
Now+1w	Day
Now+1.5w	Hour
Now+1d	Day
Now+1.5d	Hour
Now+1h	Hour
Now+1.5h	Minute
Now+1m	Minute
Now+1.5m	Second
Now:09	Hour
Now:09:30	Minute
Now:09:30:11	Second

Ranges

You can also specify a time range when specifying time. This is done with the FromDateToDate keyword.

Example

Start = FromDateToDate(now-2y, now+1y)

returns scheduled tasks with a start date from two years ago to one year into the future.

Drop list types

The drop list types are

- Confidence
- Severity
- Priority
- Item status
- Risk
- Backlog category
- Item type
- Project

·Bug status
·Custom column drop list
·Workflow
·Workflow Status
·Pipeline

Pre-defined and custom drop lists all follow the same pattern with regards to how to find on them. Please note that the drop lists here are separate types.

The following operators are ideally used on drop list types:

Equals to	=
Not equals to	!=

Since the drop list types are represented as a number, the operators for the Number type can also be used. This can make sense when the drop lists have a specified order such as Severity. You could then search for all items that have a severity worse than or equal to B: Severity <= Severity(B)

Example

Confidence = "High confidence"

ItemStatus != Completed

Project = "Development project"

BugStatus = Assigned

MyCustomColumnDropList = "Drop list item A"

Pipeline = Cutscene

Workflow = "Sign off"

Explicit typing

Confidence(High, Medium or Low)

Risk(High, Medium or Low)

Priority(High, Medium or Low)

BacklogCategory("Requirement", "Enhancement", "Technology upgrade", "Bug (A)", "Bug (B)", "Bug (C)" or "Bug (D)")

Severity(A, B, C or D)

ItemStatus("Not done", "In progress", "Completed", "Blocked" or "To be deleted")

ItemType("Scheduled task", "Milestone", "Backlog item", "Agile task", "Sprint", "Sub project" or "Bug")

Project(Project name)

BugStatus([Project name], Bug status name)

ColumnDrop(Column Name, Custom drop list item name)

Pipeline([Project name], Pipeline name)

Workflow([Project name], Workflow name)

WorkflowStatus([Project name], Workflow name, Workflow status)

When searching in the To do list or Global find the [Project name] mentioned above is relevant, because in these circumstances you need to specify the project you want to specify for example a bug status from.

When explicitly typing drop list types some of the values are fuzzily matched. For example BacklogCategory("Bug (A)") is the same thing as BacklogCategory(BugA) or BacklogCategory("A Bug").

Example of explicit typing

Severity(A)

returns all bugs that has Severity A

Project("My game project")

returns all items in project "My game project"

Pipeline("Cutscene")

Pipeline("My project","Cutscene Generic")

WorkflowStatus("Sign off", "First sign off status")

WorkflowStatus("My project", "Sign off", "First sign off status")

Column type

It is possible to compare two different columns by using the column type.

Example

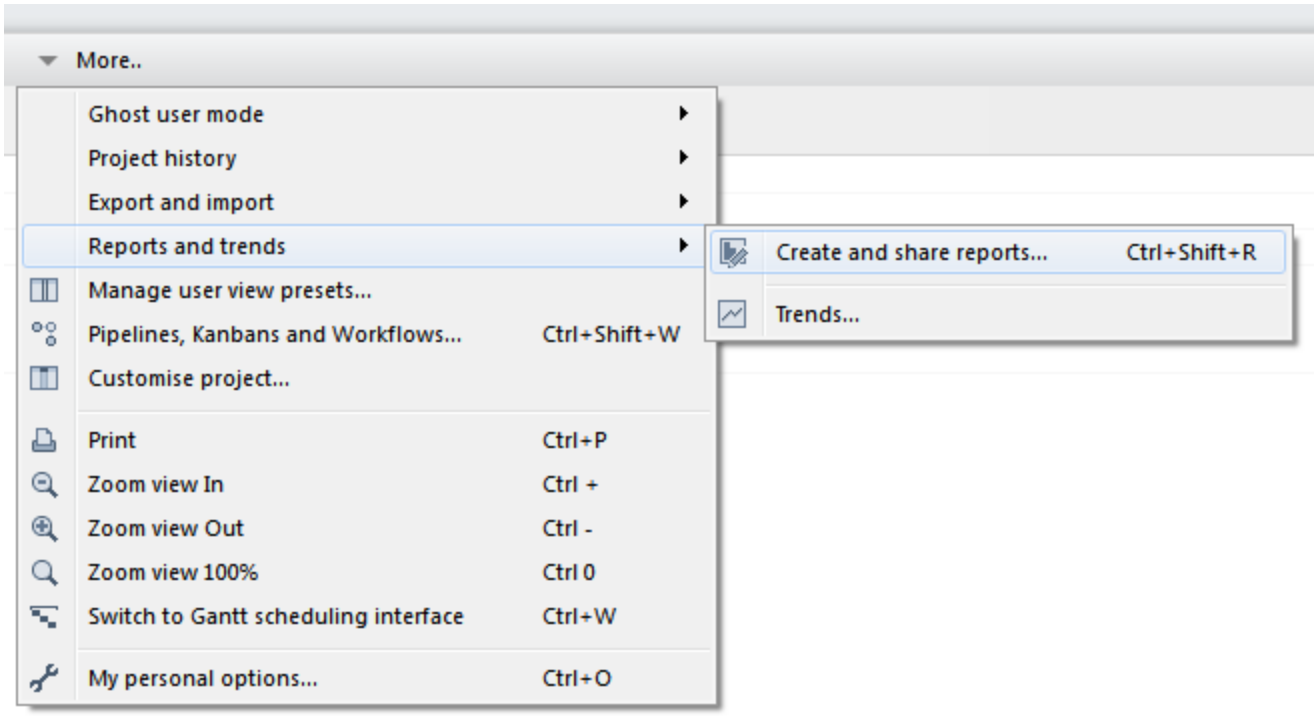
Workremaining > Column(Estimatedidealdays)

returns all items where the work remaining exceeds the estimated ideal days.

Creating and sharing reports

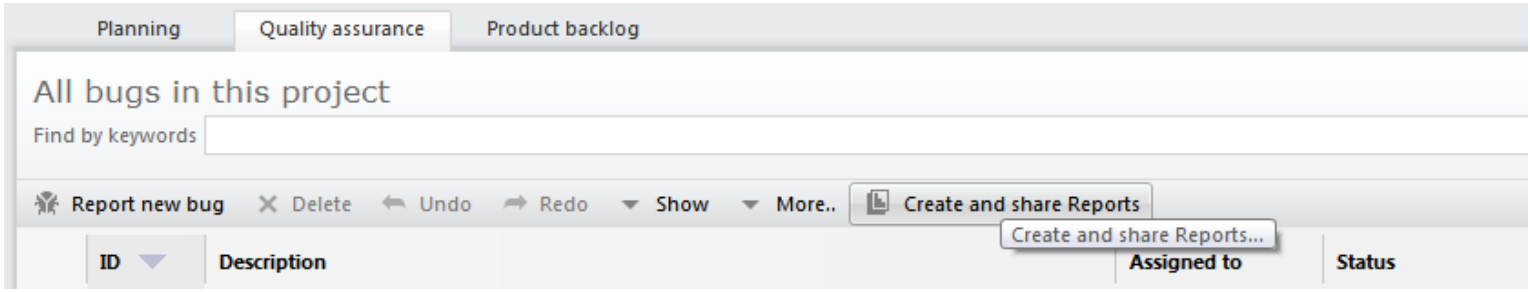
Hansoft has extensive functionality for creating and sharing reports.

The report tool is found under **More..>Reports** menu in any project or backlog view.



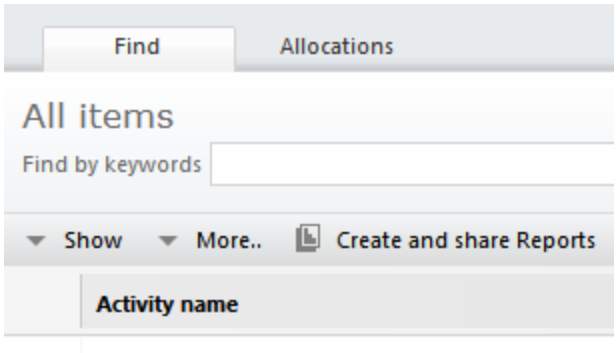
Accessing the Report tool from the project or backlog view

It is also found on the main toolbar as **Create and share Reports** in QA



Accessing the report tool from the QA section of the planning view

Additionally, it is also found on the main toolbar as **Create and share Reports** in Portfolio find if you have administration status as a user:

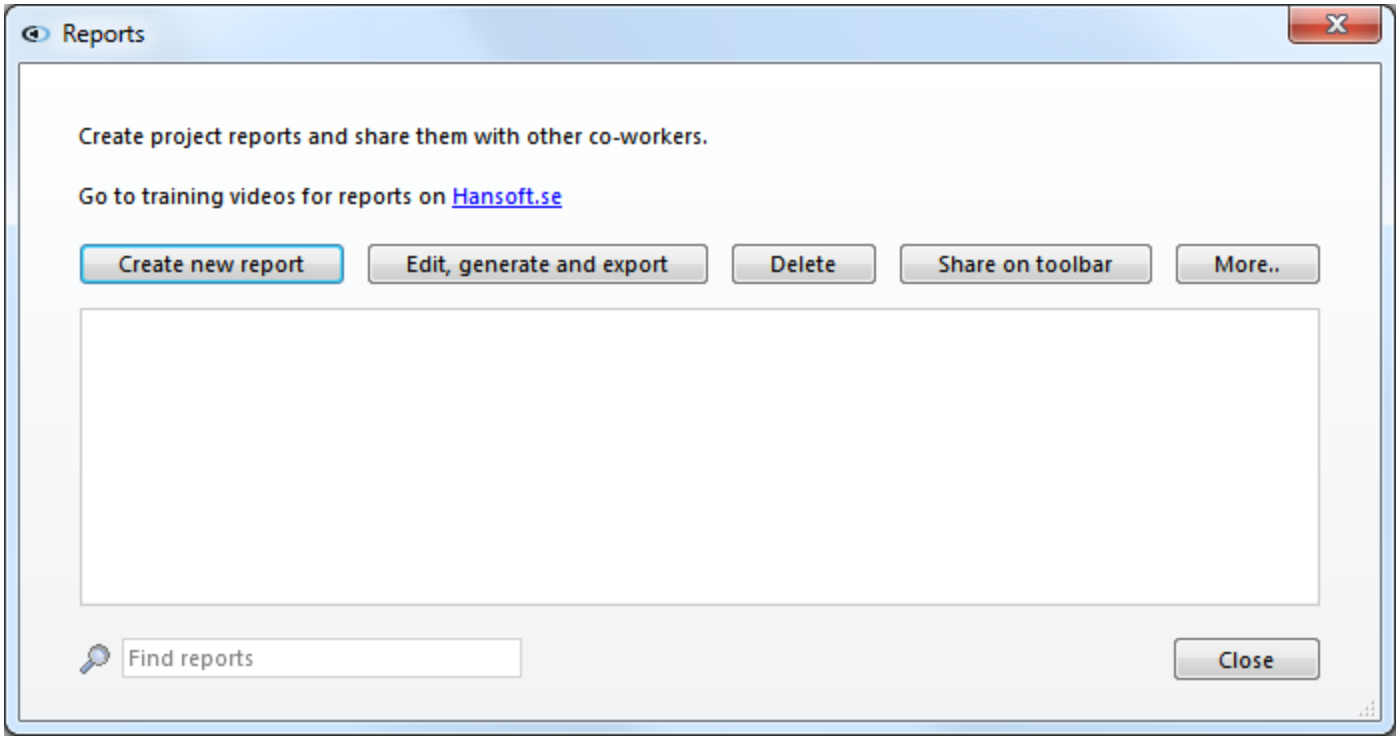


Accessing the report tool from the Portfolio view

Managing reports

Reports can be created and managed by all users in Hansoft. These personal reports can then be shared with other users and user groups. In the view below you also duplicate reports if you want to make a variation of already existing report.

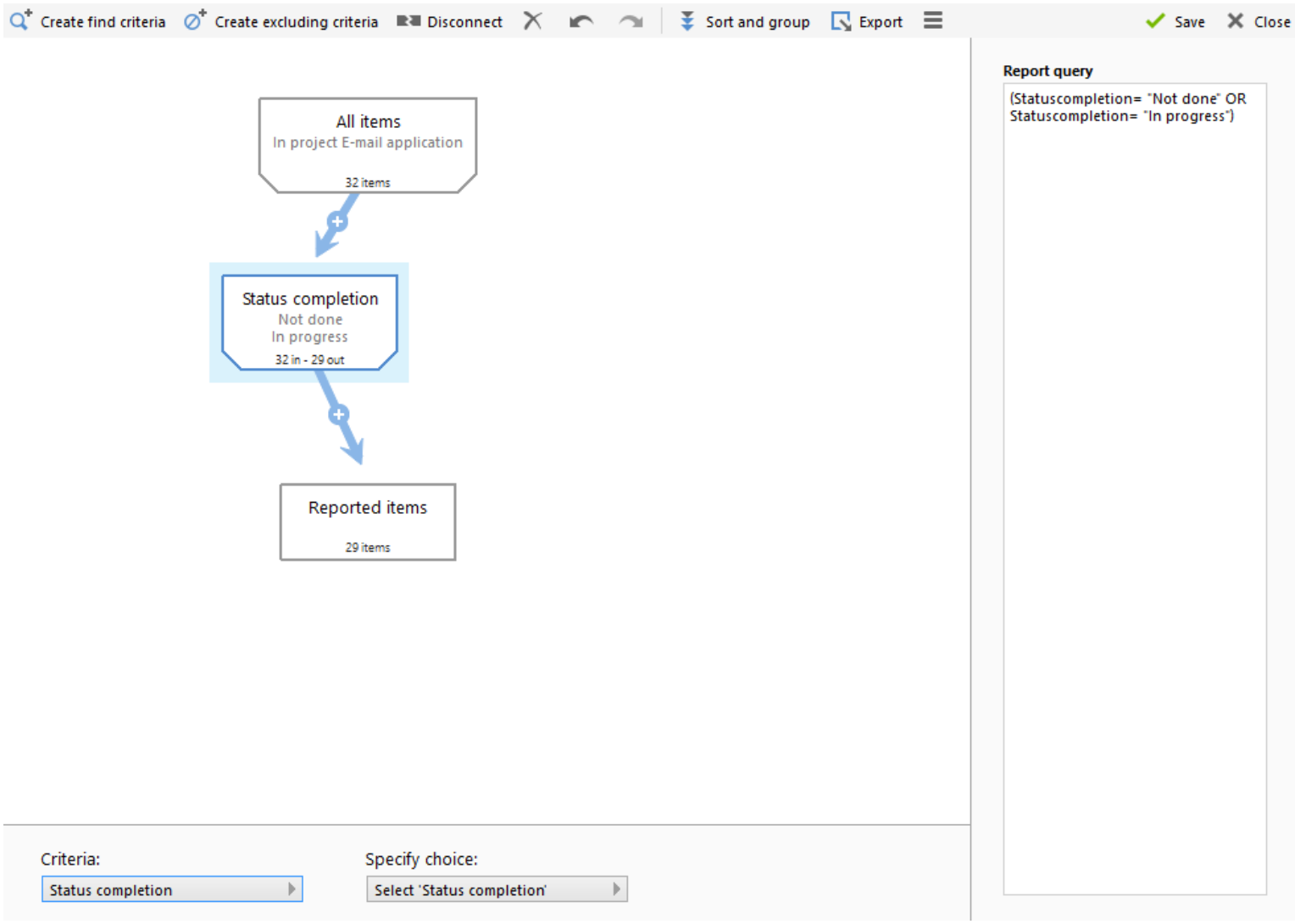
More..>Duplicate



The report tool

Editing and generating a report

When editing a report you have access to a visual query builder, sorting results, grouping results. After editing the report it will automatically update the results in the background planning view. The report results can also be exported as XML, spreadsheet or tab separated text.



Building a query

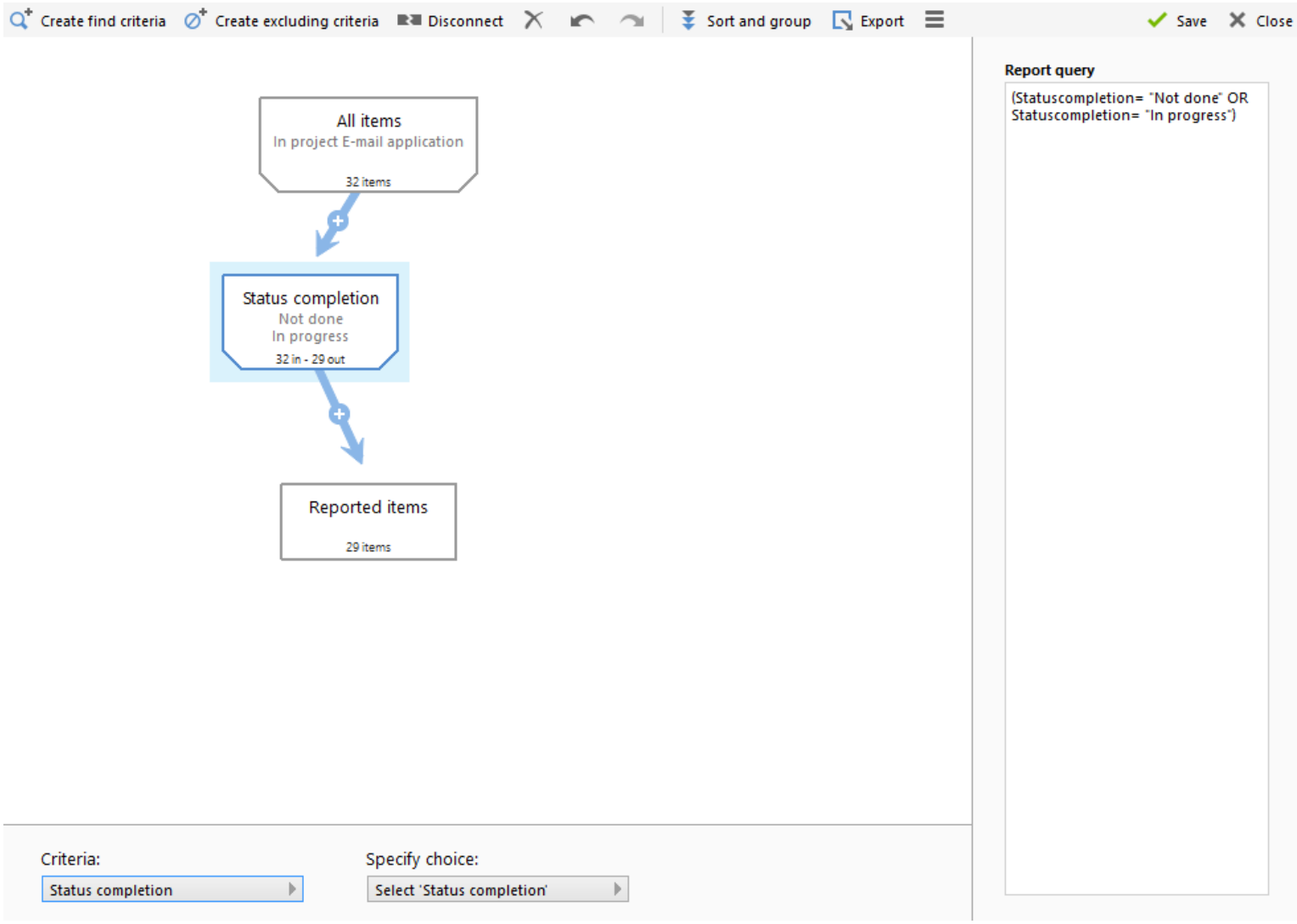
Building a query

Building a query is the first step when doing a report. A query find the tasks, items or bugs that you want to be included in the report.

The end result of the visual query builder is a report query that is in the same format as Hansoft's Find query language.

When building a query, think of water pouring from the top to the bottom and filtered in between to sort out everything you do not want.

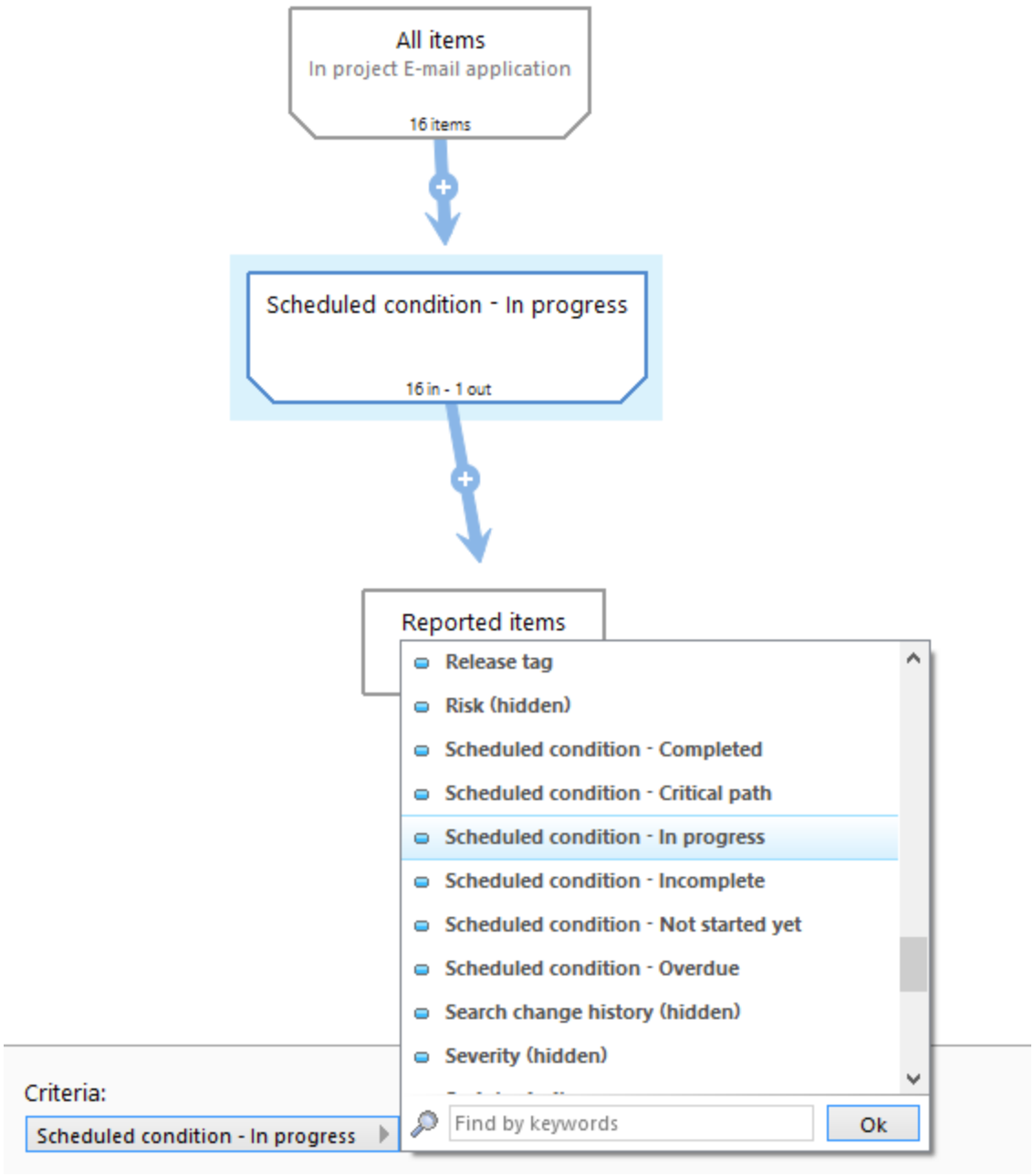
First there is All items in the project, then we have different find criteria sorting out items you do not want, and in the end there is Reported items which is the end result.



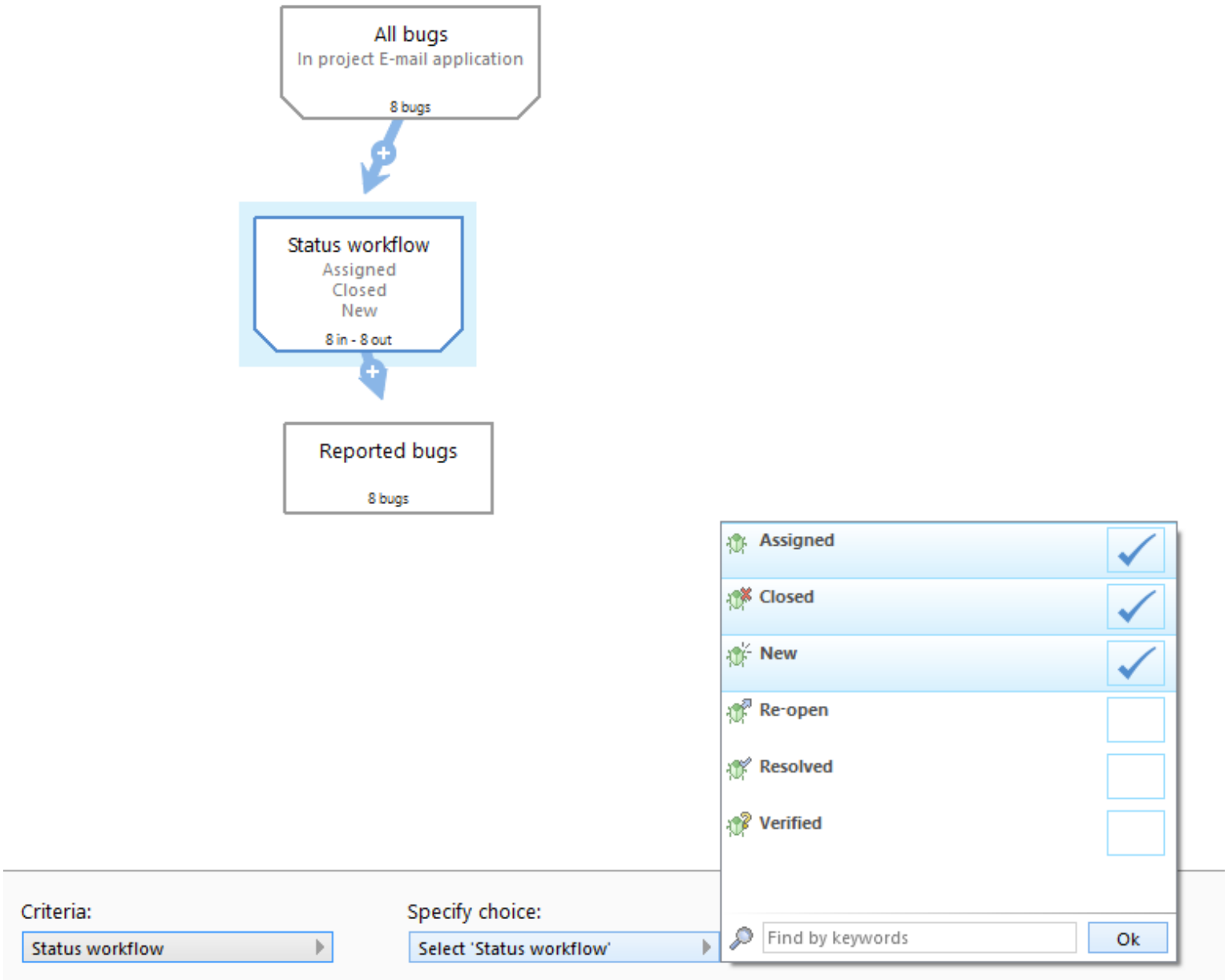
Find criteria

A find criteria is the element between All items and Reported items. After you created a find criteria you select what to find on from available columns. On each column you then select on what to specifically search for.

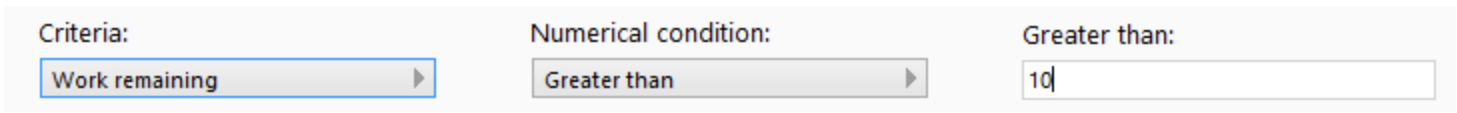
For example, finding Item status "Not done":



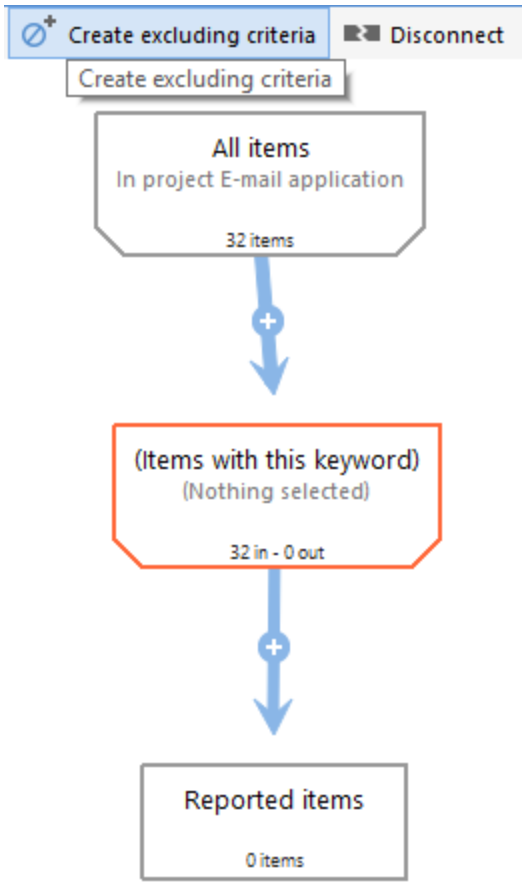
Bug status Assigned, Closed or New:



Or work remaining greater than 10 hours:

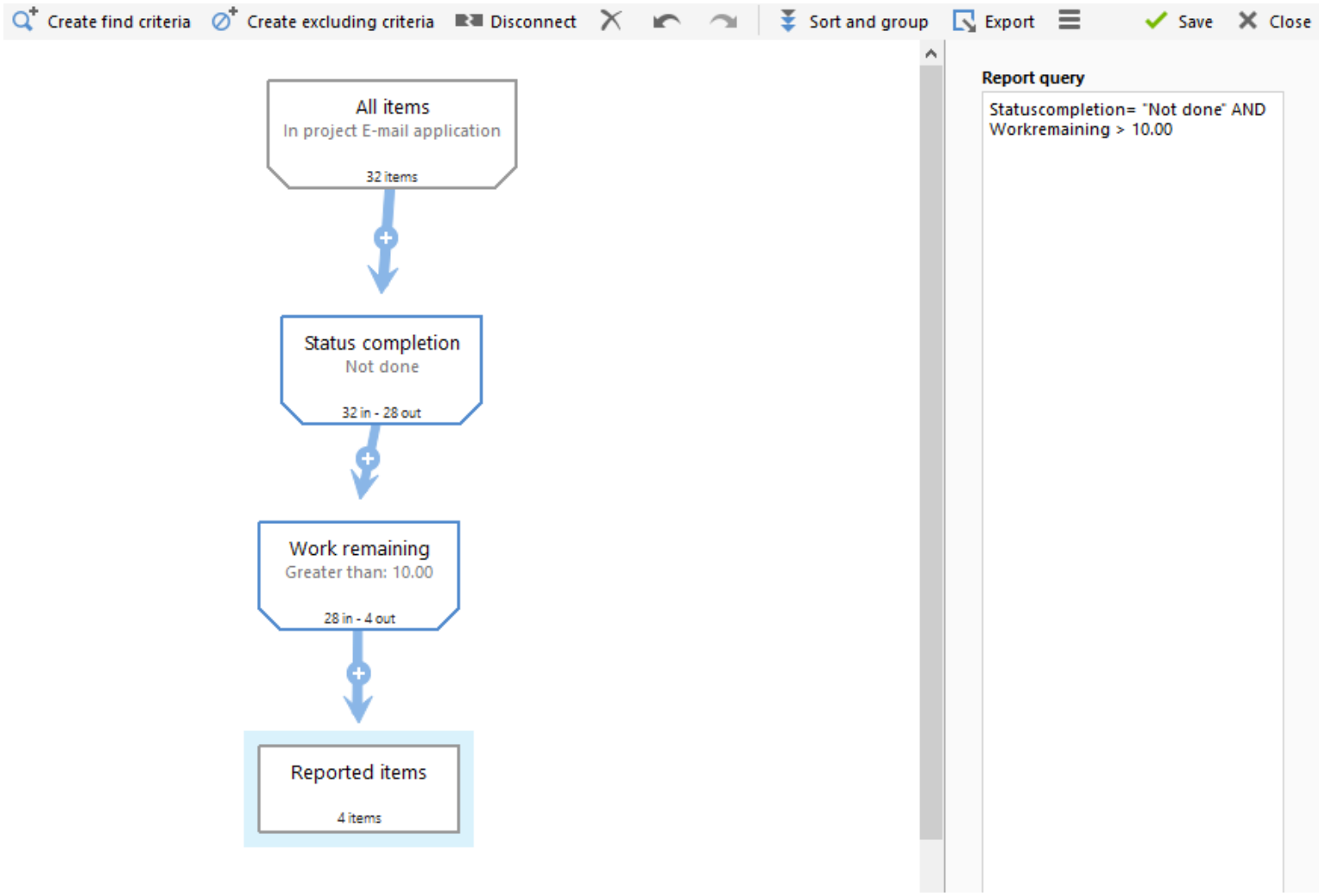


You can also create an excluding criteria. This means that everything that comes to the criteria has to NOT be what is specified (NOT ItemStatus = "Not Done") in order to pass through.

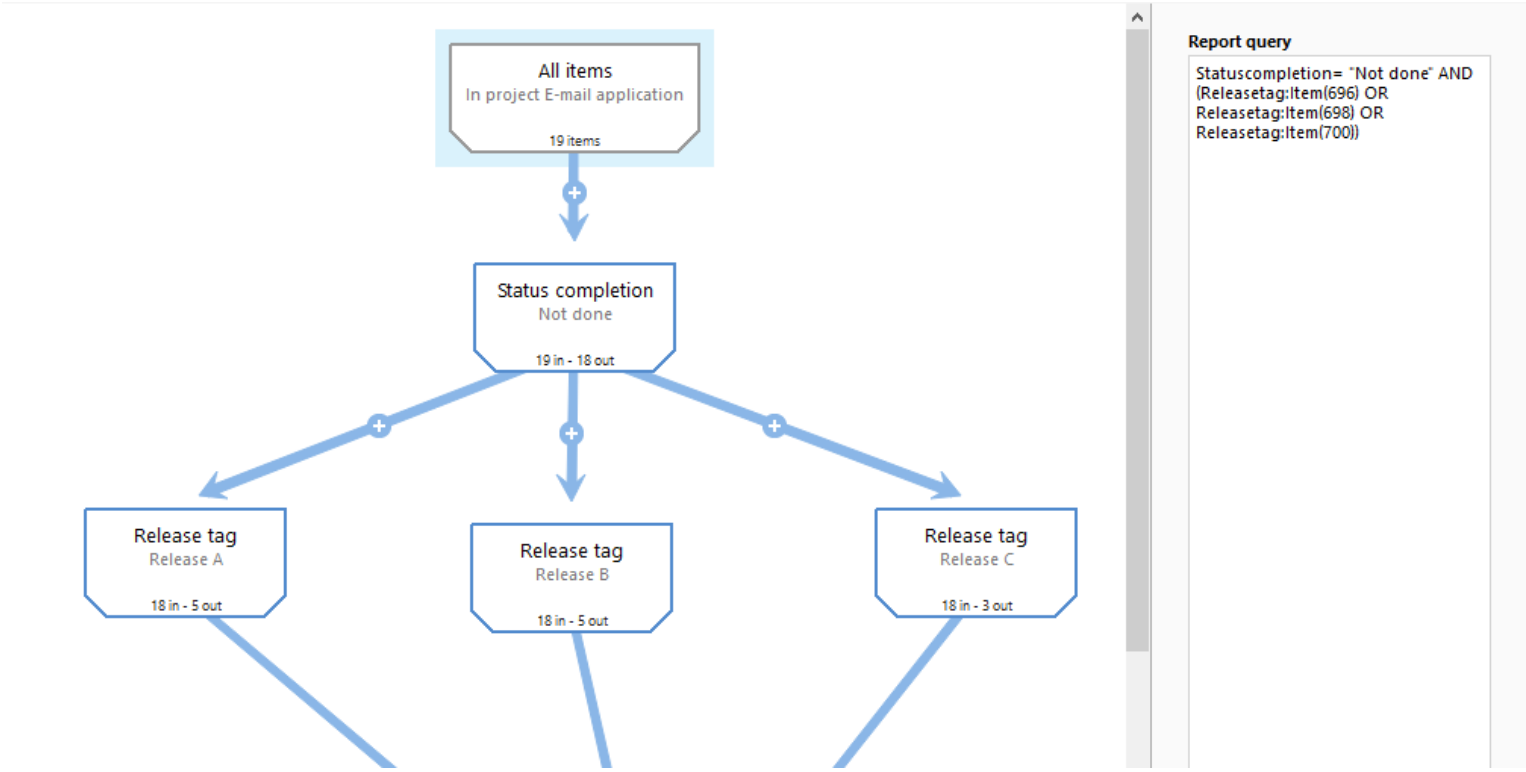


Query logic

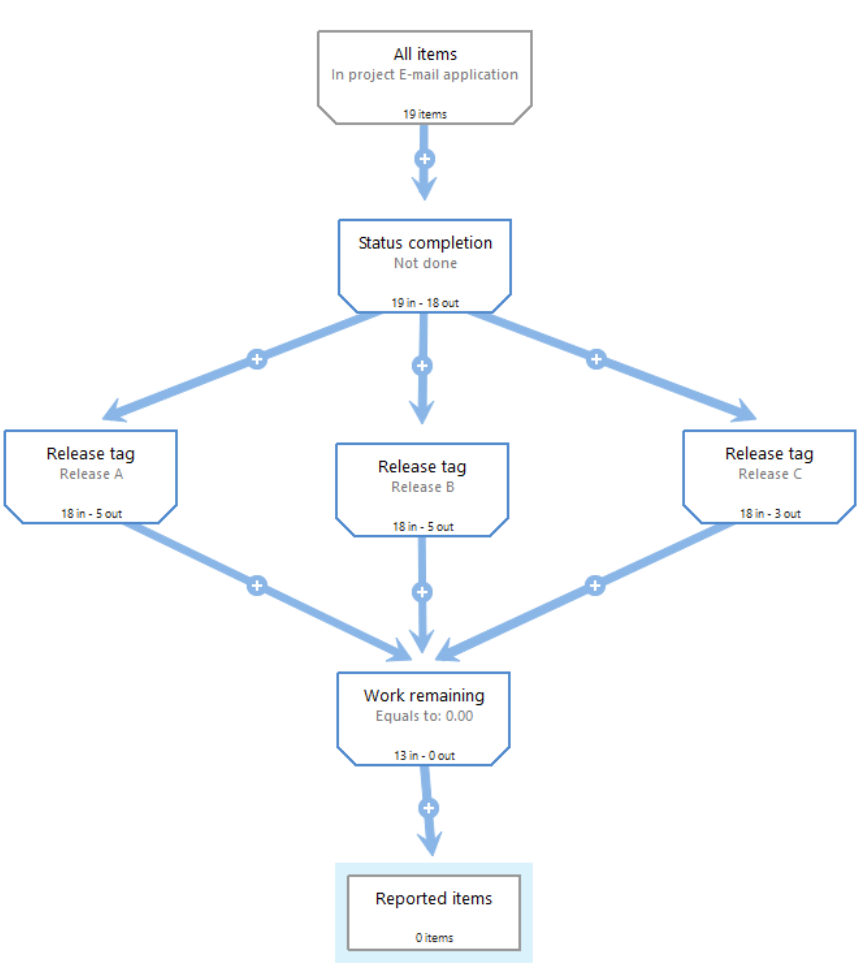
Creating a criteria after another means logically AND (see query language for more references).

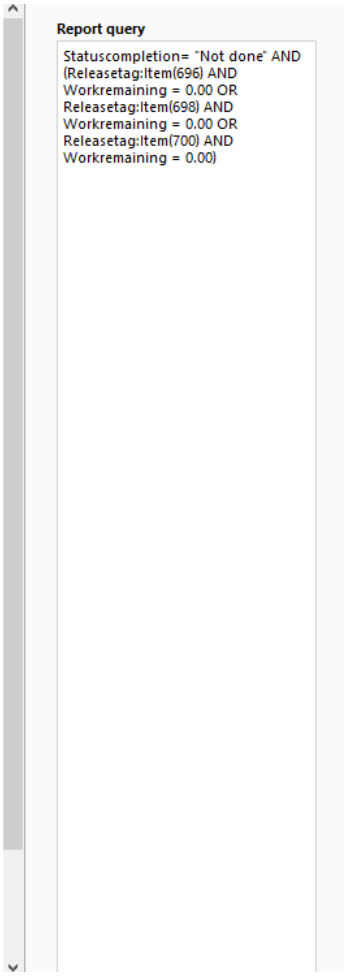


Branching out to more than one connection means logically OR (see query language for more references).



AND and branching out to OR can be combined. The visual query below would result in Itemstatus= "Not done" AND (Feature= "Feature A" AND Workremaining = 0 OR Feature= "Feature B" AND Workremaining = 0 OR Feature= "Feature C" AND Workremaining = 0).

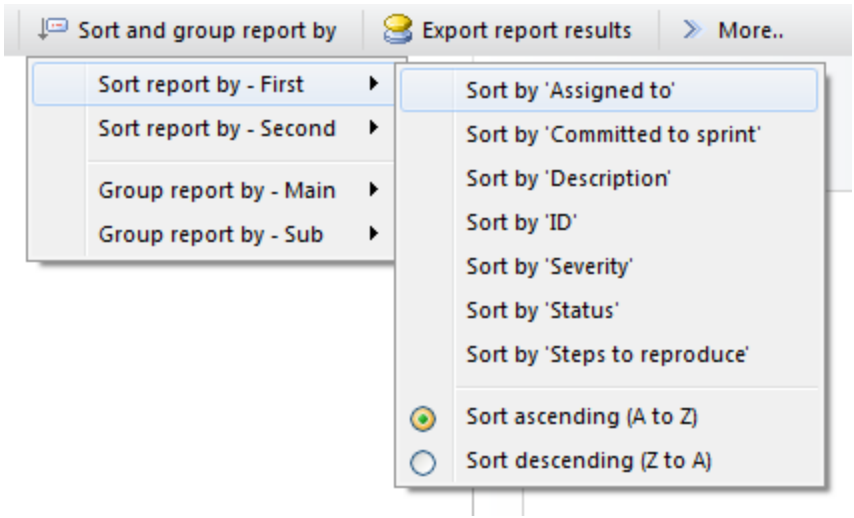




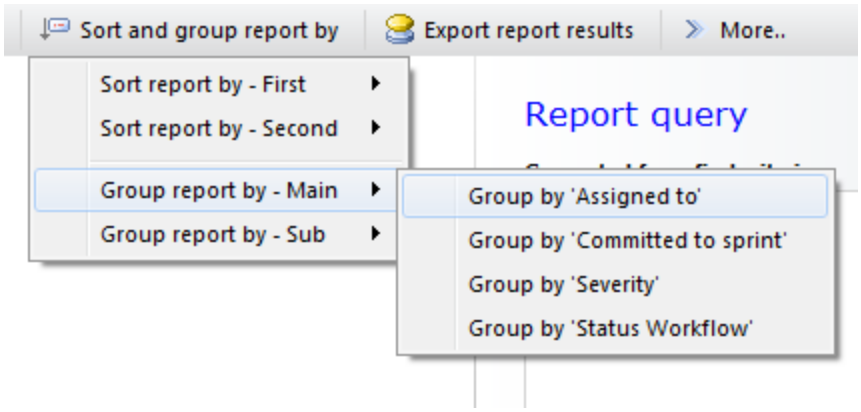
Grouping, sorting and selecting columns

After a query has been created it is time to sort and group the result. This is very important in making the mined data set from the query more understandable.

A report result can be sorted by first one and the and a second column, ascending or descending.


Sort and group report by
Export report results
More..
Sort report by - First
Sort report by - Second
Group report by - Main
Group report by - Sub
Sort by 'Assigned to'
Sort by 'Committed to sprint'
Sort by 'Description'
Sort by 'ID'
Sort by 'Severity'
Sort by 'Status'
Sort by 'Steps to reproduce'
Sort ascending (A to Z)
Sort descending (Z to A)

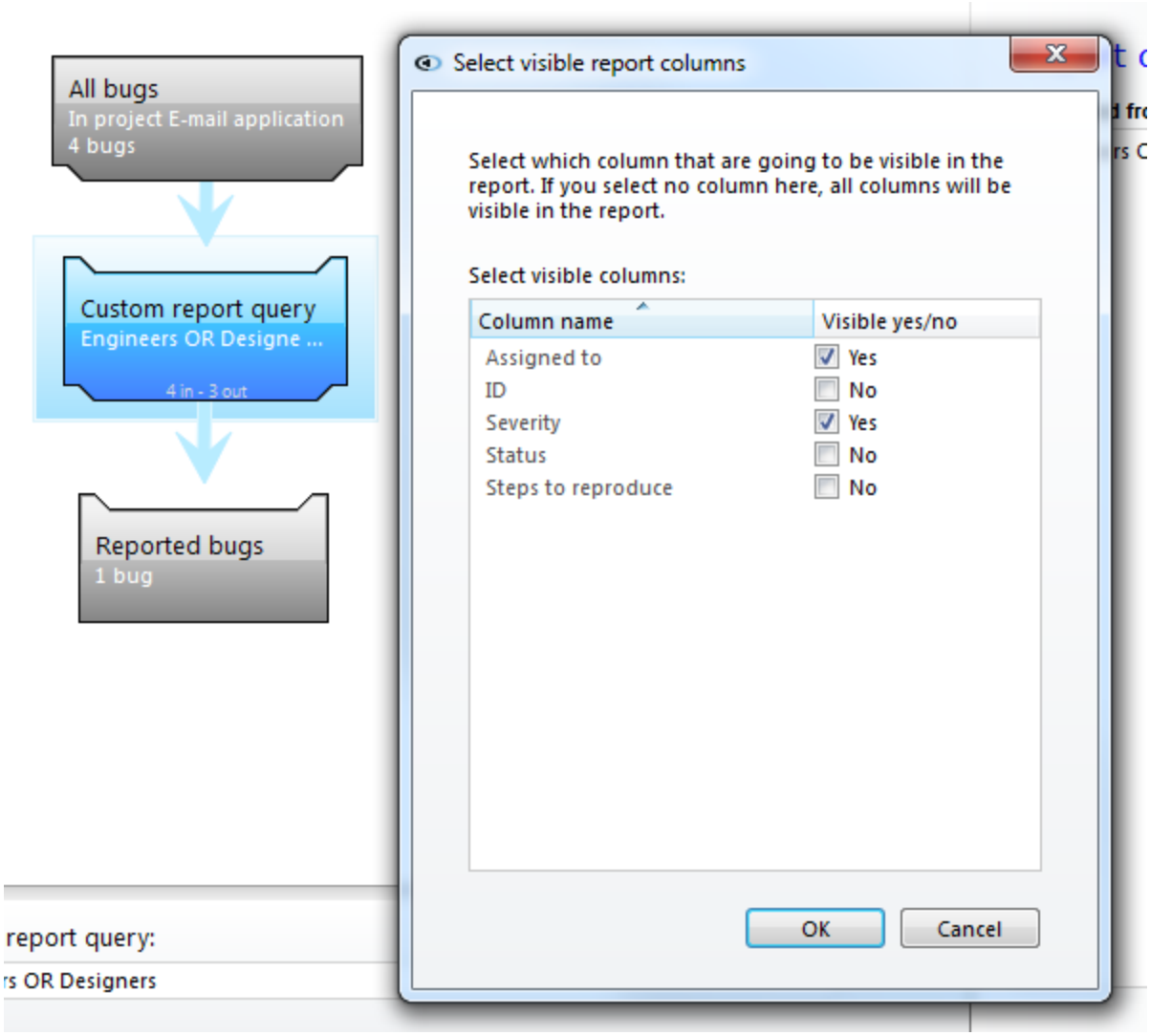
Grouping a report is done first with a main and then a sub group. The following column types are applicable for grouping: Text, Multi-line text, Drop list single choice, Drop list multiple choice, and People.



This is an example of items being first grouped per feature and then per sub feature, then sorted ascending in from the work remaining column.

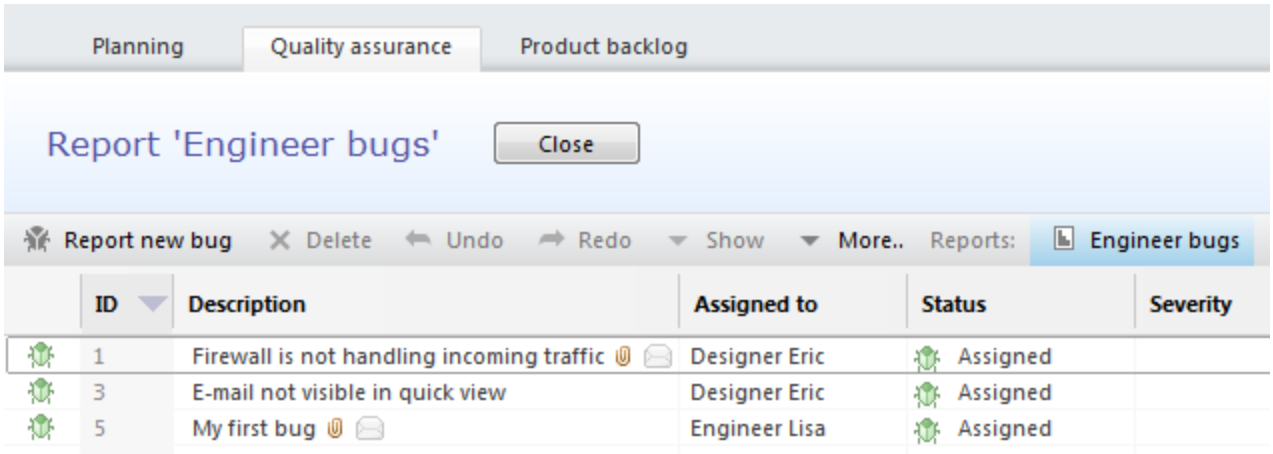
Item name	Work remaining	Feature	Sub feature	Item status
Feature A				
Sub feature A:				
Task 1	5h	Feature A	Sub feature A	Not done
1 item	5h			
Sub feature B:				
Task 5	2h	Feature A	Sub feature B	Not done
Task 12	5h	Feature A	Sub feature B	Not done
Task 8	6h	Feature A	Sub feature B	Not done
3 items	13h			
4 items	18h			
Feature B				
Sub feature A:				
Task 3	5h	Feature B	Sub feature A	Not done
Task 6	6h	Feature B	Sub feature A	Not done
Task 9	24h	Feature B	Sub feature A	Not done
3 items	35h			
Sub feature B:				
Task 10	5h	Feature B	Sub feature B	Not done
1 item	5h			
Sub feature C:				
Task 13	1h	Feature B	Sub feature C	Not done
Task 2	2h	Feature B	Sub feature C	Not done
2 items	3h			
6 items	43h			

You can also select which columns that are going to be visible in the planning view:



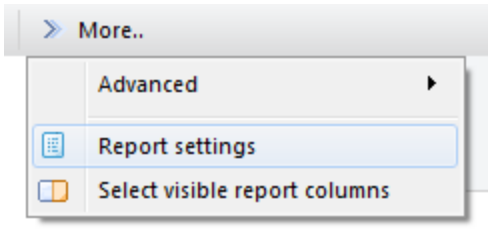
Using find while report is active

By default, Hansoft suppresses using the Find function while a report is active, as this can give empty or confusing results.



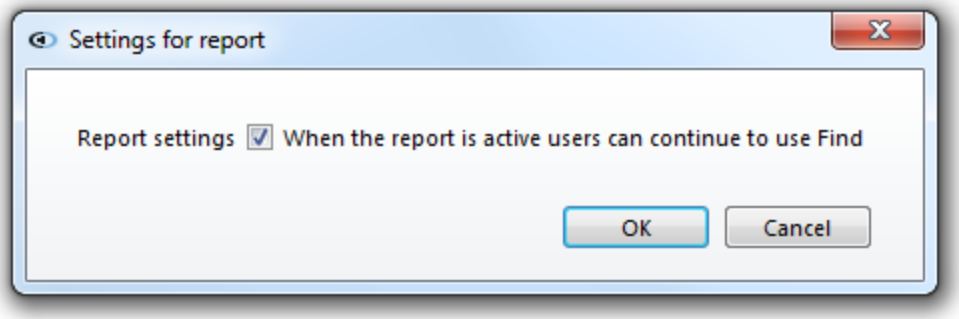
The **Find** button or textbox is not available with a report active

Individual reports can, however, be flagged to allow the Find function to be used. In the Report editor, **More..>Report settings**.



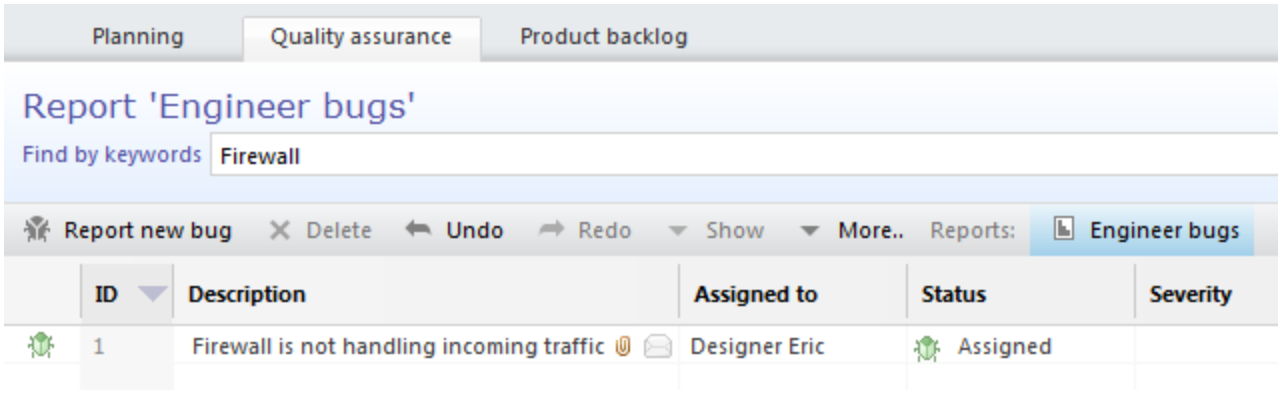
Entering the Report settings

Enable the option to allow Find when the report is active.



Enabling the Find function for a report

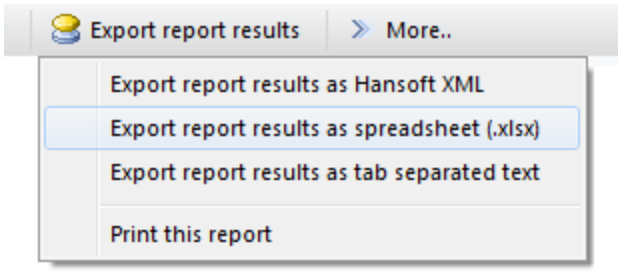
When the report is active you can now use Find.



Exporting report results

When the report is finished you may want to export it to a file or print it.

The report can be exported as Hansoft XML, spreadsheet or as tab-separated text.


Export report results
More..
Export report results as Hansoft XML
Export report results as spreadsheet (.xlsx)
Export report results as tab separated text
Print this report

This is how a raw report, grouped and sub grouped in Hansoft, can look like when exporting to spreadsheet and load it into Microsoft Excel®:

A	B	C	D	E	F	G	H	I	J	K
Item name	Work remaining	Feature	Sub feature	Item status	Hyperlink	Release tag	Work priority	Resources		
Feature A										
Sub feature A										
Task 1	5	Feature A	Sub feature A	Not done			1			
1 item	5h									
Sub feature B										
Task 5	2	Feature A	Sub feature B	Not done			5			
Task 12	5	Feature A	Sub feature B	Not done			10			
Task 8	6	Feature A	Sub feature B	Not done			14			
3 items	13h									
4 items	18h									
Feature B										
Sub feature A										
Task 3	5	Feature B	Sub feature A	Not done			3			
Task 6	6	Feature B	Sub feature A	Not done			6			
Task 9	24	Feature B	Sub feature A	Not done			13			
3 items	35h									
Sub feature B										
Task 10	5	Feature B	Sub feature B	Not done			12			
1 item	5h									
Sub feature C										
Task 13	1	Feature B	Sub feature C	Not done			9			
Task 2	2	Feature B	Sub feature C	Not done			2			
2 items	3h									
6 items	43h									

This is how the same report can look like when it is printed:

	Item name	Work remaining	Feature	Sub feature
	Feature A			
	Sub feature A:			
1	Task 1	5h	Feature A	Sub feature A
	1 item	5h		
	Sub feature B:			
2	Task 5	2h	Feature A	Sub feature B
3	Task 12	5h	Feature A	Sub feature B
4	Task 8	6h	Feature A	Sub feature B
	3 items	13h		
	4 items	18h		
	Feature B			
	Sub feature A:			
5	Task 3	5h	Feature B	Sub feature A
6	Task 6	6h	Feature B	Sub feature A
7	Task 9	24h	Feature B	Sub feature A
	3 items	35h		
	Sub feature B:			
8	Task 10	5h	Feature B	Sub feature B
	1 item	5h		
	Sub feature C:			
9	Task 13	1h	Feature B	Sub feature C
10	Task 2	2h	Feature B	Sub feature C
	2 items	3h		
	6 items	43h		

Portfolio allocations

Examining the allocation of users is important in a number of crucial ways:

·It is preferable to have a smooth 100% allocation of the user over time, avoiding over- and under allocation.

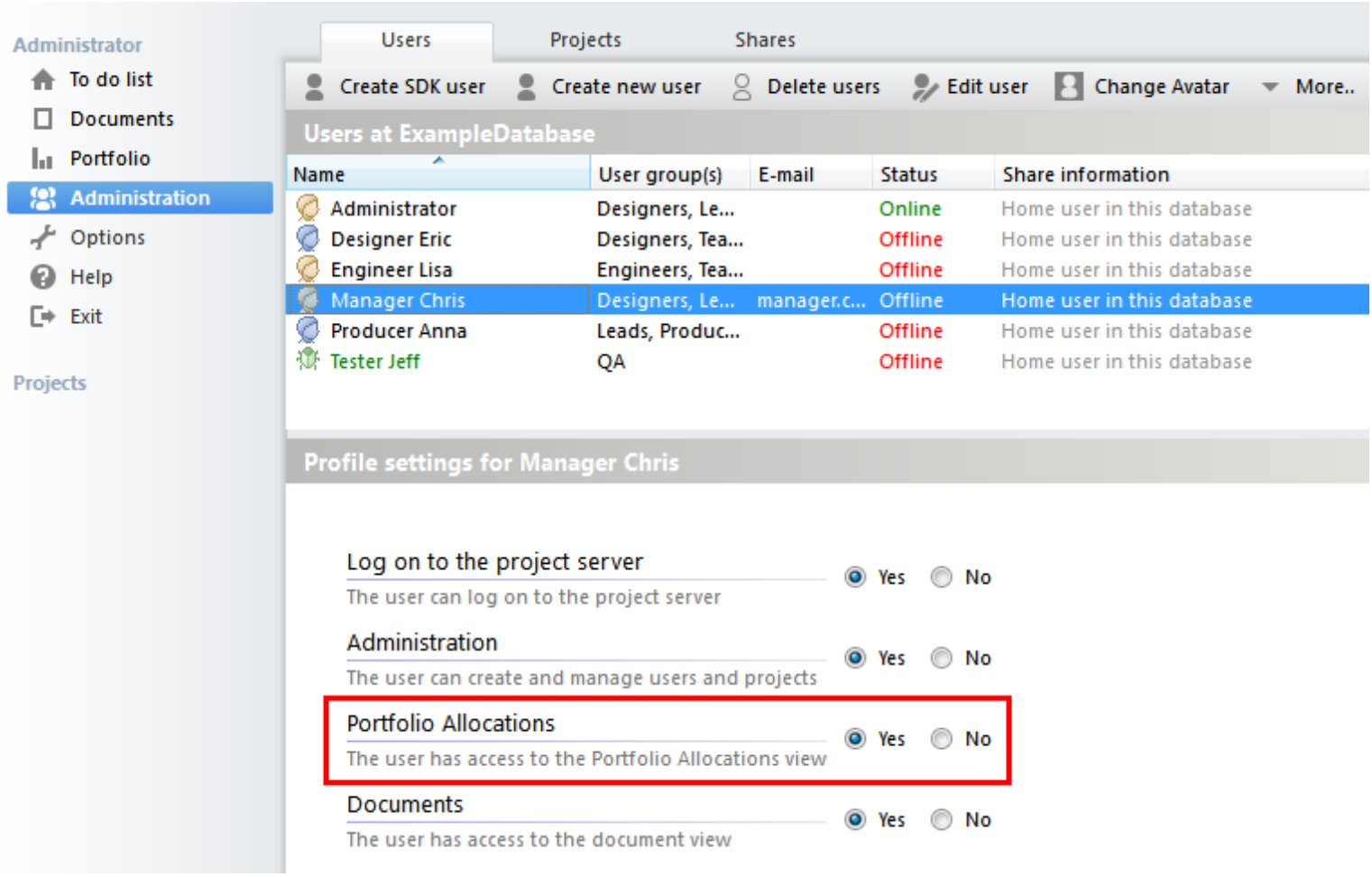
·You want to see where and between which projects there is a conflict if over-allocation occurs.

·You want to get a clear overview of the Portfolio allocations for the whole company or groups within the company.

All things listed above are visualized in the Portfolio Allocations view.

Enabling access to Portfolio allocations

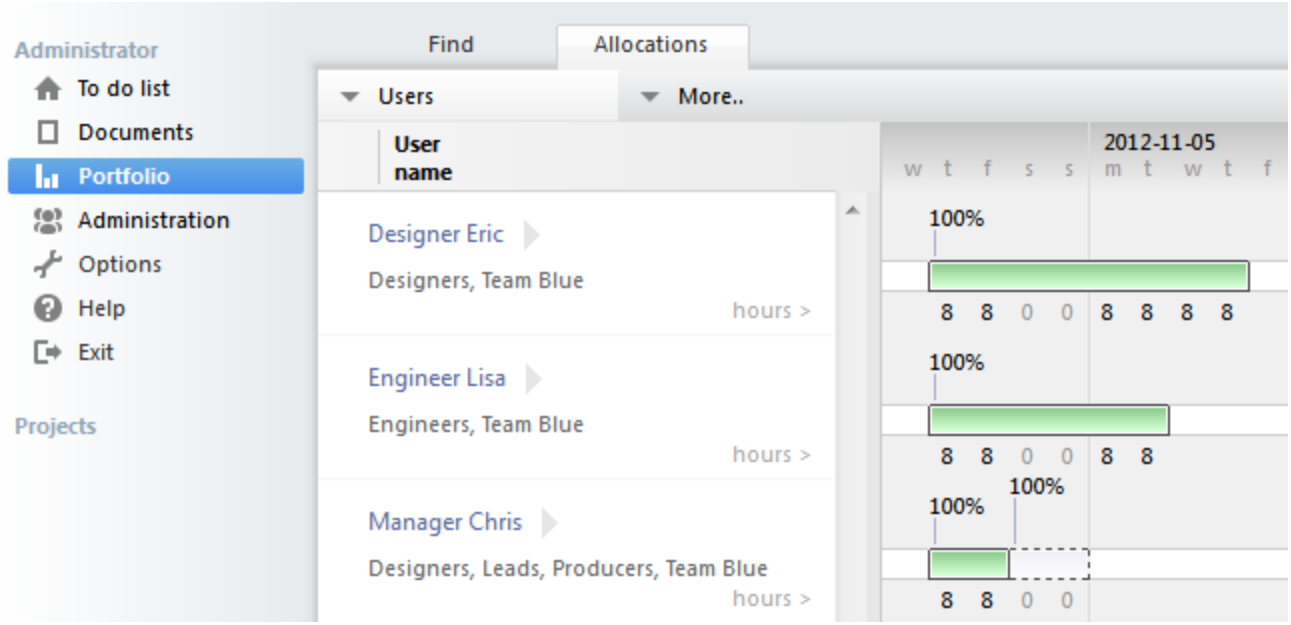
The Portfolio allocations view is enabled in the profile settings for user under the **Users** tab in administration.



Enabling portfolio allocations for a user

The portfolio allocations view

All users that have access to Portfolio allocations will see the Portfolio section in the left-hand navigation pane.



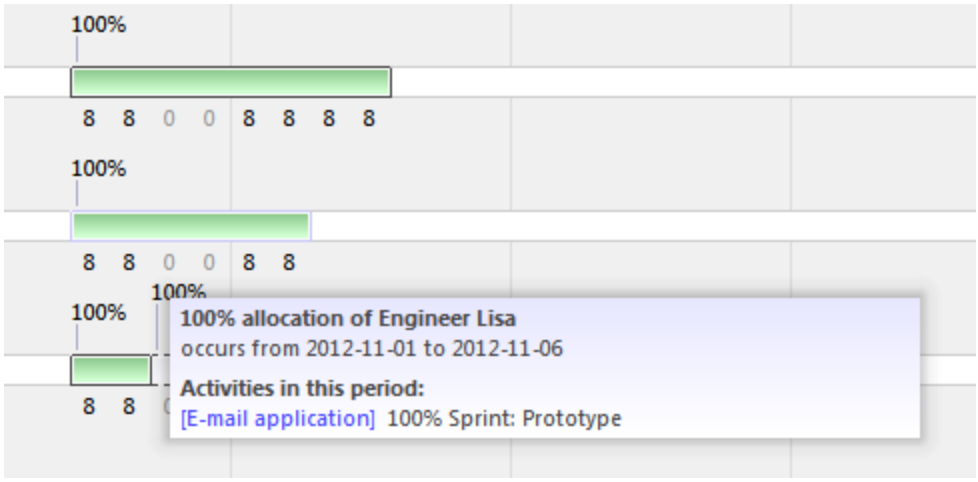
The portfolio allocations view

All the company users are listed in this view, and all changes that occur in the projects will affect this view in real-time. An average allocation for all users is shown and updated in real-time. This can come especially in handy when one is looking for periods of under- and overallocation for the entire company over time.

For every user, you have a white horizontal bar and zones in different colors that indicate Portfolio allocations from 0% and upwards. In the most zoomed in mode in the timeline view and under the Portfolio allocations zones, you have the hours that the user is allocated to day by day. If you move the mouse over a Portfolio allocations zone a tool tip will pop up displaying important details.

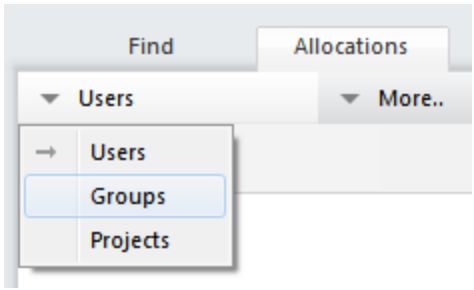
Go to tasks from Portfolio allocations

You can right click on a user allocation zone and go directly to tasks in that zone from any Portfolio allocations view. If you are going to do user leveling, this is a very handy tool. Use F8 to go back to Portfolio allocations after you have corrected the tasks.



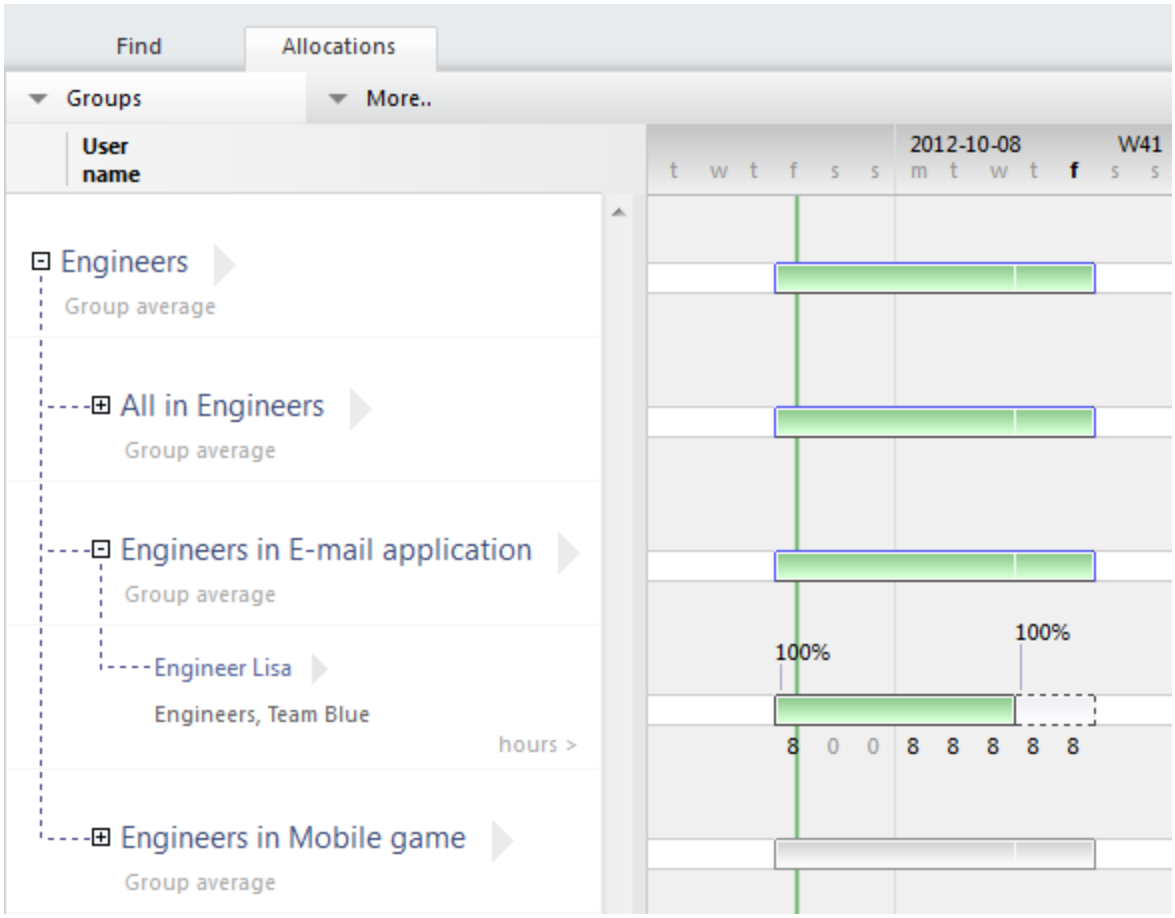
User groups

When administrating a user, you can assign a group to a user, like "Programmers" or "System designers". These groups come to use in the Portfolio allocations view when selecting **Show all user groups** on the top blue bar. One can now see the average allocation for all groups and see all individuals in the group. Also, you can see user groups divided by project.



The portfolio view selector

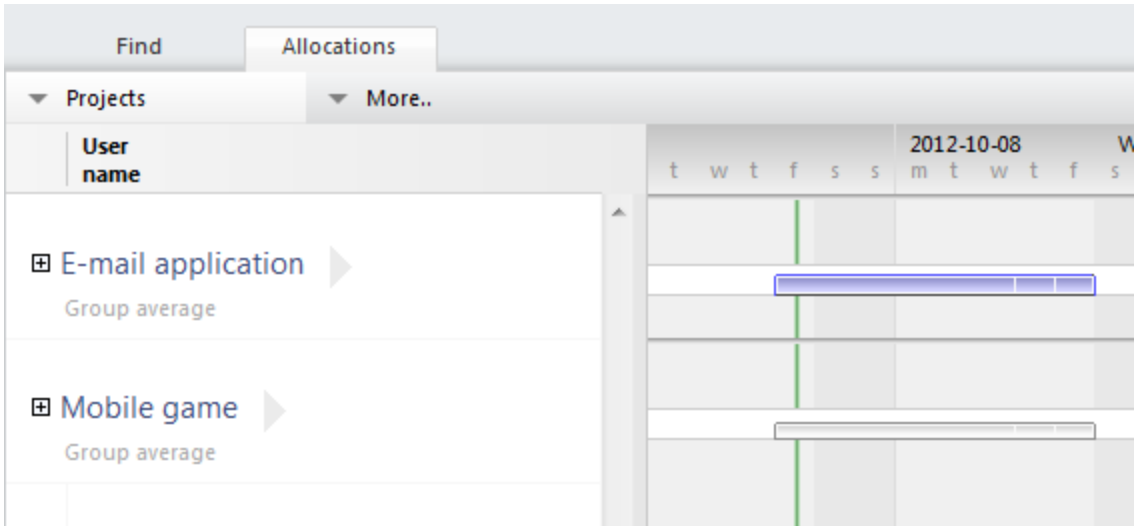
Please note: the gray zones in this example signify that the user group "Programmers" are allocated in general but do not have any work related to the project



Users in projects

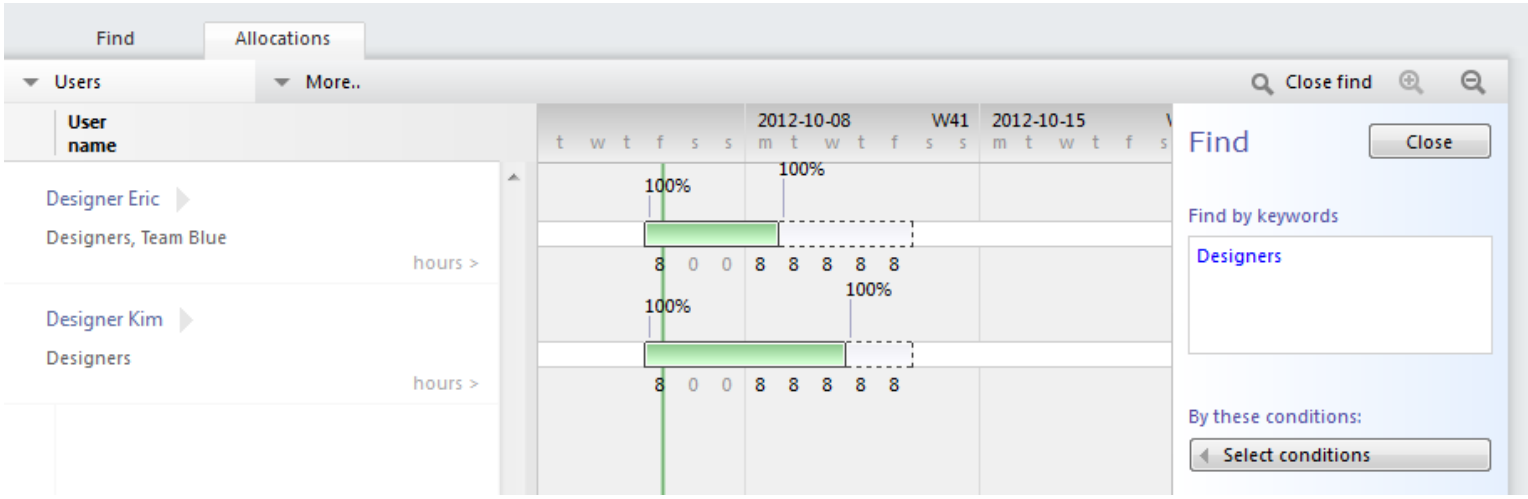
In a similar way to the user groups, Hansoft can divide users into projects, showing the average allocation for these projects. Select **Show all projects** on the top blue bar. You can now see all individuals in the group and the average allocation for all user groups within the project.

Please note: again, the gray zones in this example signify that the user group "Programmers" are allocated in general but do not have any work related to the project.



Finding users, groups or projects

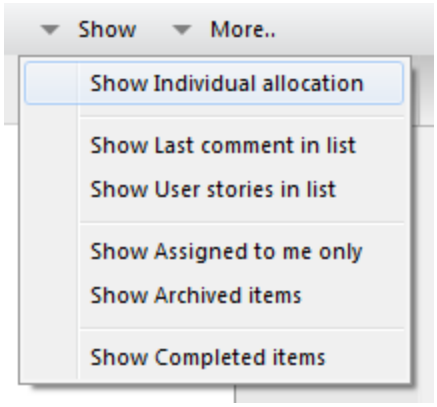
When pressing the **Find** button on the toolbar it opens the "Find window". This function is very useful to cut out exactly that data that you are looking for and it works in the same way that a common search engine works (like Google.com). Write the keywords that you are looking for and combine them with a condition below and instantly find the information.



Showing individual allocations in the project plan

One effective way of getting a smooth user allocation or to solve allocation conflicts between projects is to insert the user allocation directly into the project plan, letting it update when you update the plan. This is

often essential when performing user leveling. A recommendation for user leveling, except while inserting Portfolio allocations, is to use the arrange functionality.



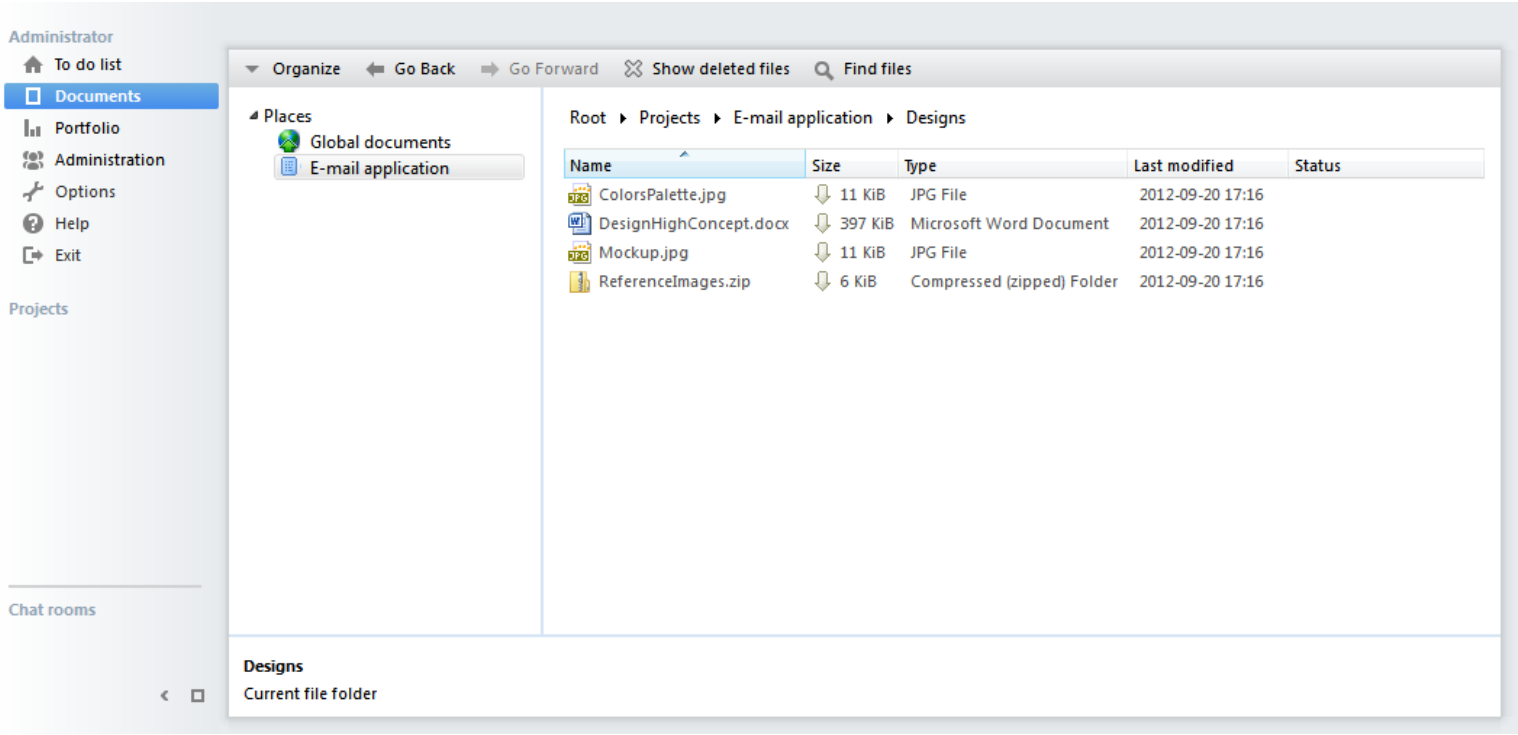
Documents

Hansoft has the ability to store documents on the central project server.

Documents can be uploaded and downloaded from Hansoft Project Manager and can, therefore, be managed independently of their physical location. Hansoft also incorporates full version control, and the documents can be rolled back to earlier versions (click Show file history in the Documents view).

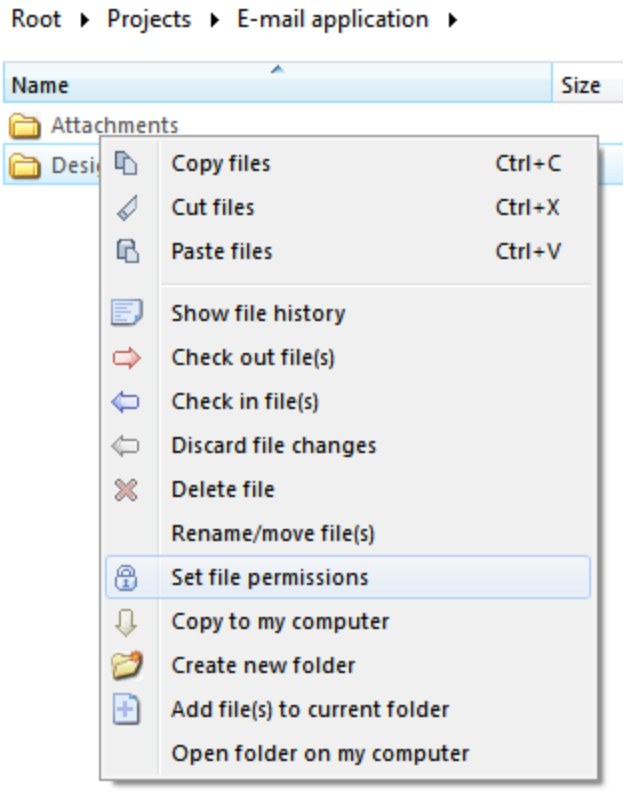
The Documents view

The Documents view emulates the standard behavior of a file browser. Users may read, edit, check in and check out documents. When checking out a document, you become the owner of that document, and only you can make changes to it. Once the document has been checked in, the document again becomes available for everybody else and will be stored as the latest version.



A typical documents folder

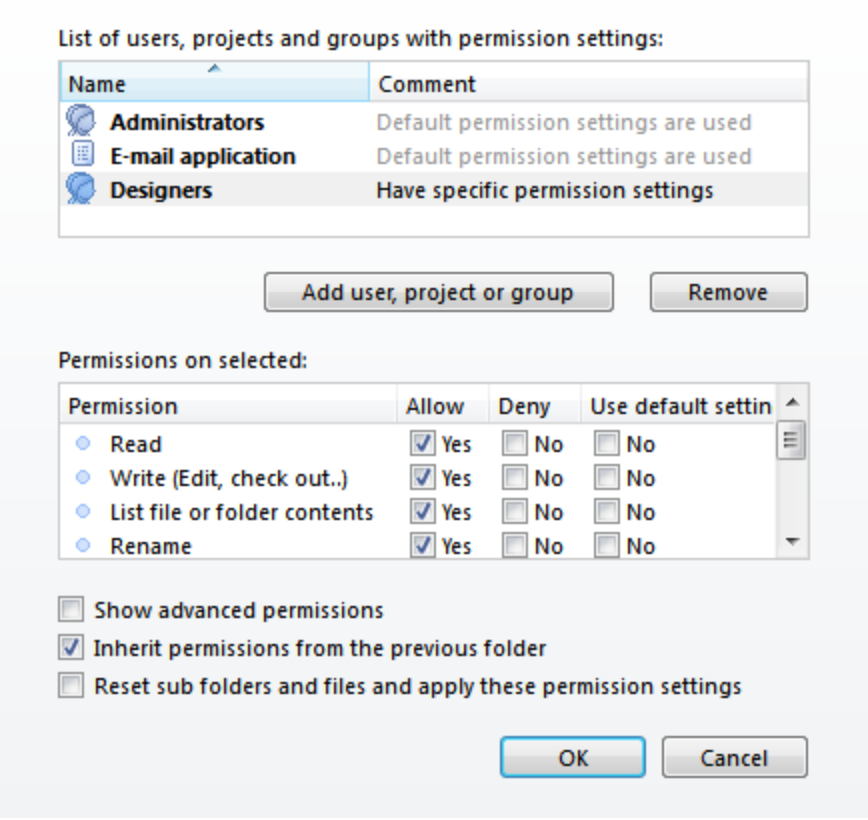
Permissions for reading and editing documents



Accessing the file permissions dialog

The Administrator account on the server database always has full access to all documents and folders, as do users with administrator rights, unless this has been explicitly changed by another administrator in the user settings. Users without administrator rights have access to the projects they are connected to, as well as the Global Documents folder. This too can be changed by administrators.

In addition, detailed permissions can be set on all files and folders for everyone except for the Administrator account who has the right to reset all other set permissions



The file permissions dialog

More details on File and Folder tasks

Edit file

Editing a file automatically performs a complementary Check Out operation. The file is then opened in the associated editor (typically a word processor). Other users are now prevented from editing the document as long as you have it checked out. Click on Check in to check in the file once your changes are made.

Read file

Opens the document in the associated editor without checking it out. You can, therefore, make no changes to it.

Show file history

Every time a document is checked in, for example, a new version is stored in the file/document history. A document can be rolled back to an earlier version.

Check out

Checks out the document. Other persons are now prevented from editing the document as long as you have it checked out; click on Check in to check in the document.

Check in

Checks in the document and the new version becomes available to everyone else.

Discard changes

The file will no longer be checked out and the current version of the document will be discarded.

Delete

Documents and folders can be either temporarily or permanently deleted. A temporarily deleted document may be shown by clicking on the **Show deleted files** button on the main Documents toolbar.

Restore deleted

If a document is temporarily deleted, and shown by clicking the Show deleted files button, it can be restored to its original state.

Set permissions

A document or a folder can have very detailed permissions. Please read "Permissions for reading and editing documents" above.

Copy to my computer

The document or folder will be copied or updated from the central project server.

Create new folder

Creates a new folder within the current folder.

Add to current folder

You can add documents from your computer and store them on the central project server.

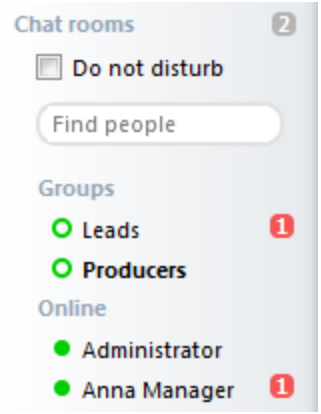
Using the chat

Chat rooms

There are two types of chat rooms: Individual User-to-user chats, and Group chats, that are based upon the User Groups set up by an administrator. There is no concept of "joining" a chat room -- all chat messages

are saved and time-stamped on the Hansoft server, enabling users to catch up on conversations that occured while they were logged off.

Unread counts



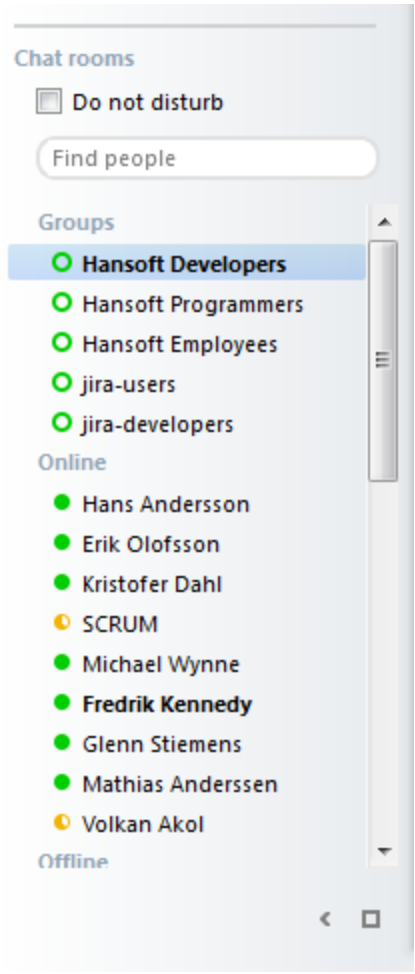
The chat room list showing unread messages

Incoming messages will increase the Unread messages counter of the chat room in which the message arrived. The Chat rooms header will also display the number of unread messages, even when the Chat section is collapsed.

Starting a chat

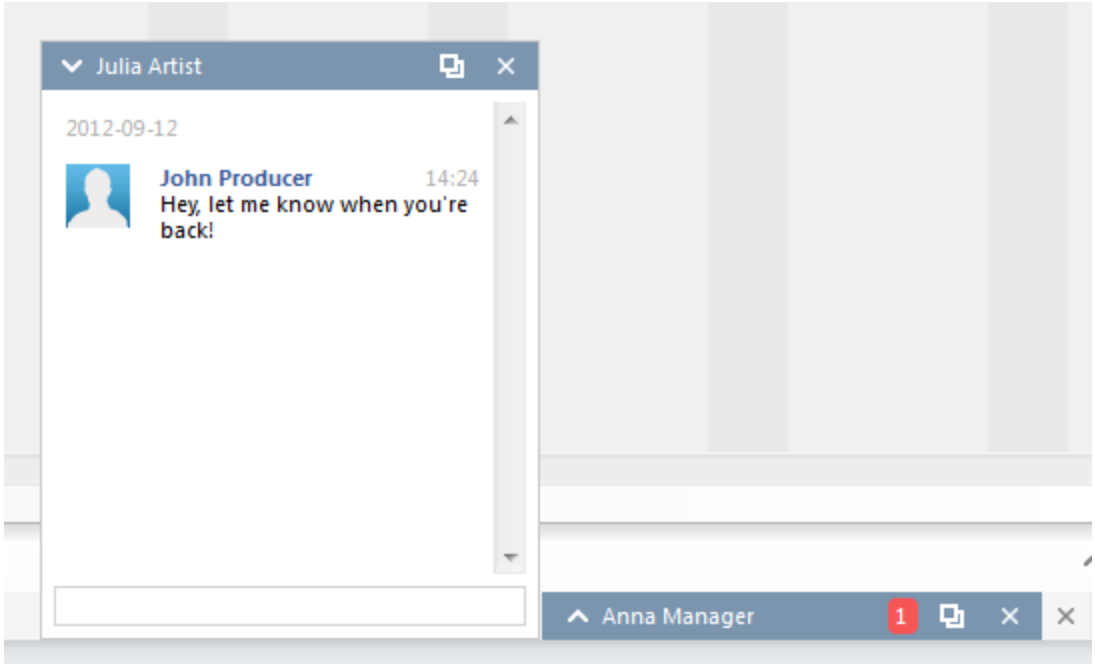
To start a chat conversation, double-click on the name of the group or user in the Chat rooms section. The name will be displayed in a bold typeface to indicate that a chat window has been opened.

Chats can also be started by clicking a Name link in any other area of Hansoft.



The chat roomslist

Open and minimized chat rooms



An open and a minimized chat room

Chat rooms can be open or minimized. Minimized chat rooms will have the Unread counter visible whenever there are unread messages, while open chat rooms will not. All chat rooms will, if the option is enabled in Personal Options, play a sound to indicate an incoming message.

Click the Minimize icon of an open chat window to minimize it. Click the Open icon to open it.

Presence indicators

In the "Chat rooms" list, the users and groups have icons indicating their current presence. The presence is determined by user activity (moving the mouse), whether the user is connected to Hansoft, and whether the user has enabled "Do not disturb".

User presence icons

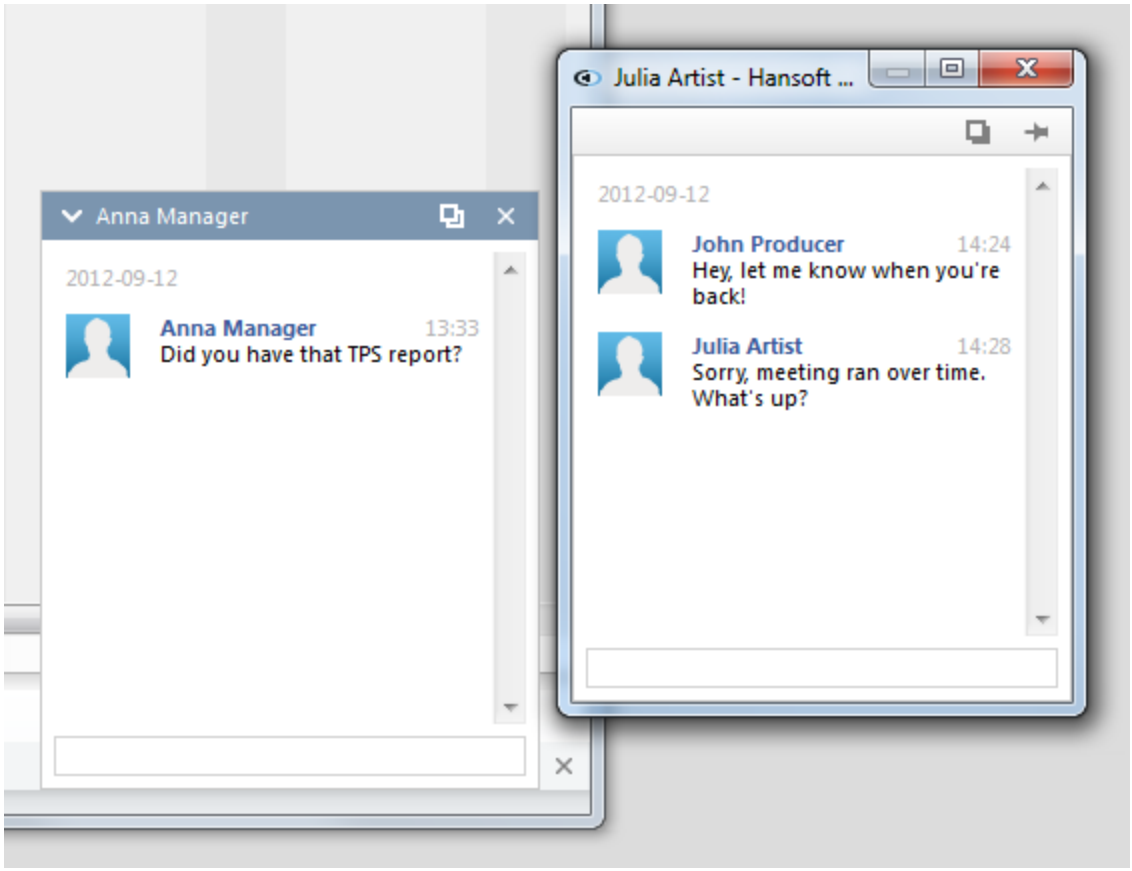
- User is connected to Hansoft, and is active
- User is connected, but has not moved the mouse in the last 5 minutes
- User connected, but has enabled Do not disturb
- User is currently not connected to Hansoft

Group presence icons

- At least one member of the group is connected
- No other members of the group are connected

Docking and pinning chat rooms

Docking and undocking



Docked and undocked chat windows

Chat windows can be either docked within the Hansoft main window, or appear as undocked (free-floating) windows. This is controlled by clicking the "Undock icon" of a docked window, or the "Dock icon" of an undocked window. To set docking behavior for all new chat windows, see the Chat section in your Personal Options.

Pinning and unpinning

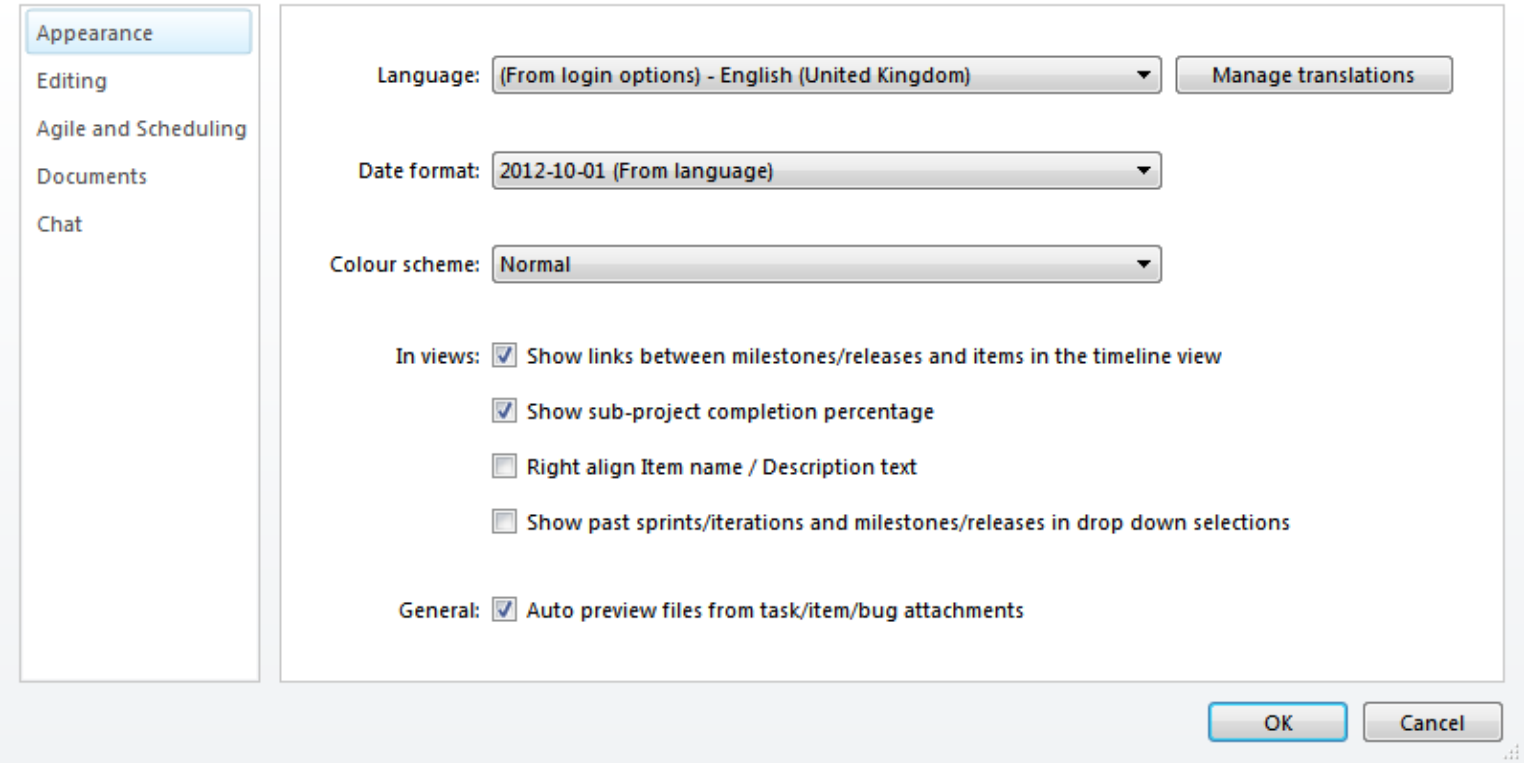
Undocked chat windows can be pinned to always appear on top of other windows. Click the "Pin icon" to bring a window to the front, and the "Unpin icon" to "release" the window, allowing it to be hidden behind other windows.

Personal Options

The "Personal Options" dialog is the central location for user preferences affecting various parts of Hansoft, involving localization, appearance, editing and planning options.

You can open the Options window in Project schedule, Backlog, Quality assurance, Administration or in the To do list. You can use Ctrl + O (Cmd + O) to open the options window.

The options are both personal and global and will affect all views in Hansoft.

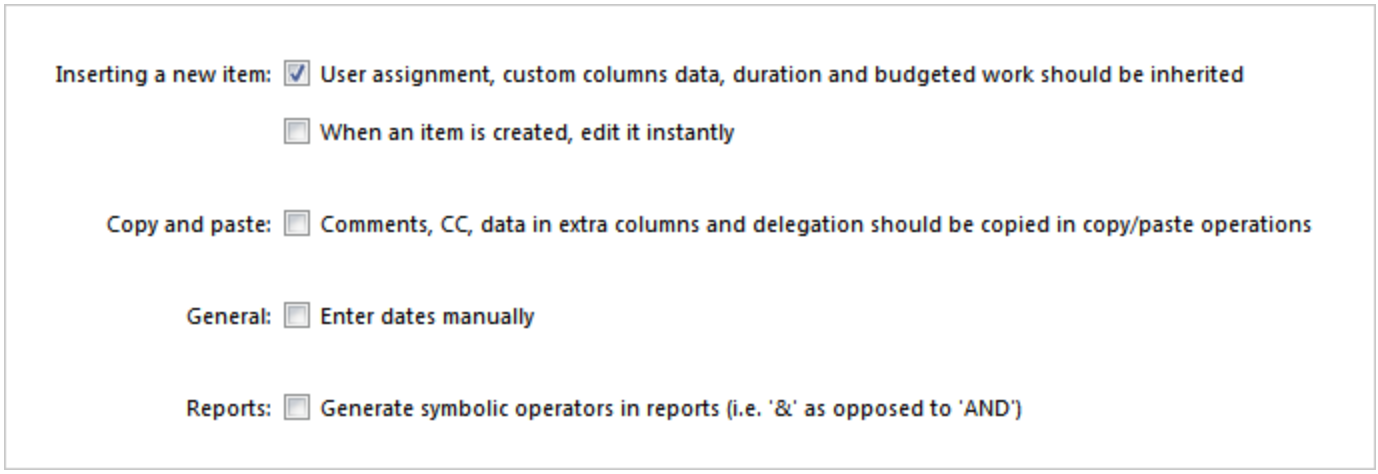


The Personal Options dialog

Appearance

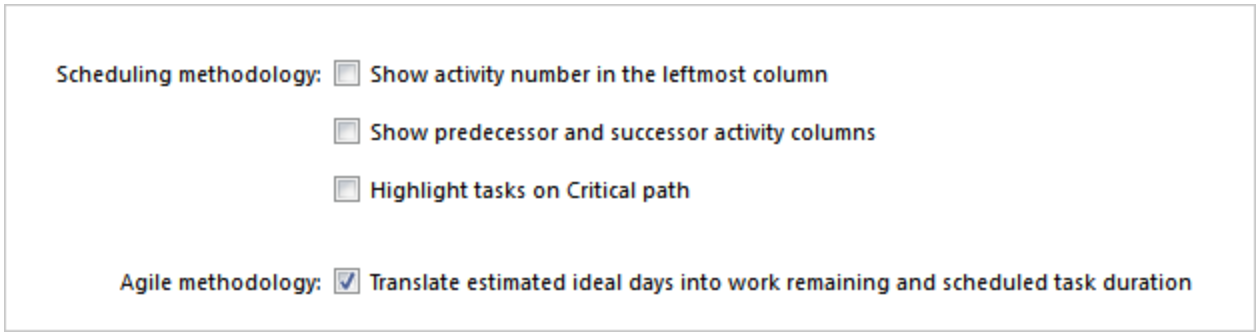
The "Appearance" section includes language, date format, color scheme and various visual features.

Editing


Inserting a new item:
User assignment, custom columns data, duration and budgeted work should be inherited
When an item is created, edit it instantly
Copy and paste:
Comments, CC, data in extra columns and delegation should be copied in copy/paste operations
General:
Enter dates manually
Reports:
Generate symbolic operators in reports (i.e. '&' as opposed to 'AND')

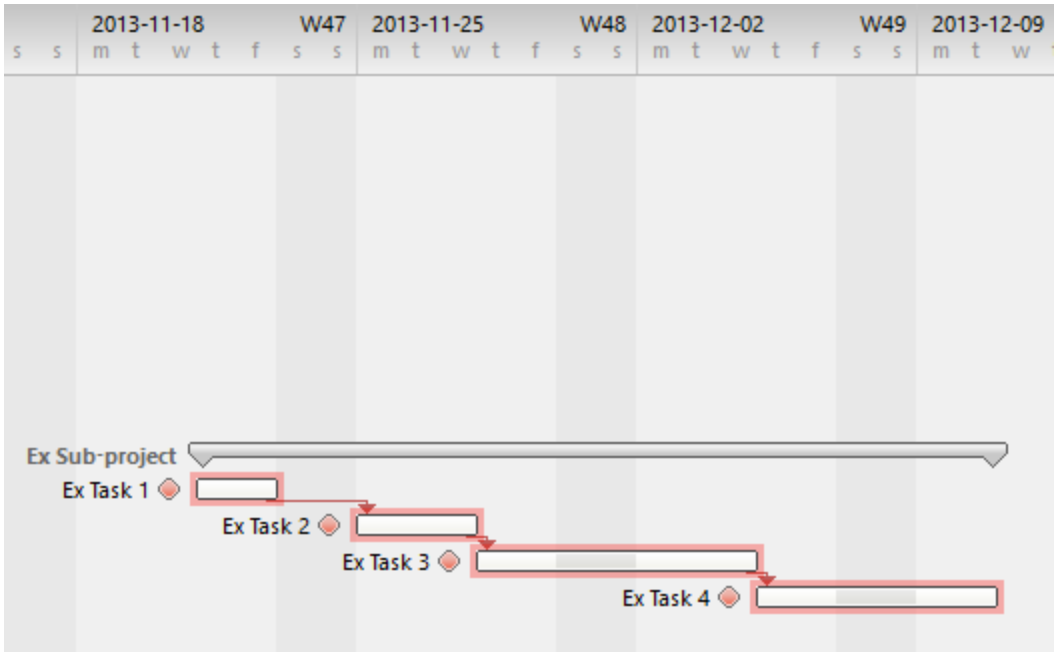
Under "Editing", settings are available for how Hansoft deals with inserting and copying / pasting items.

Agile and Scheduling


Scheduling methodology:
Show activity number in the leftmost column
Show predecessor and successor activity columns
Highlight tasks on Critical path
Agile methodology:
Translate estimated ideal days into work remaining and scheduled task duration

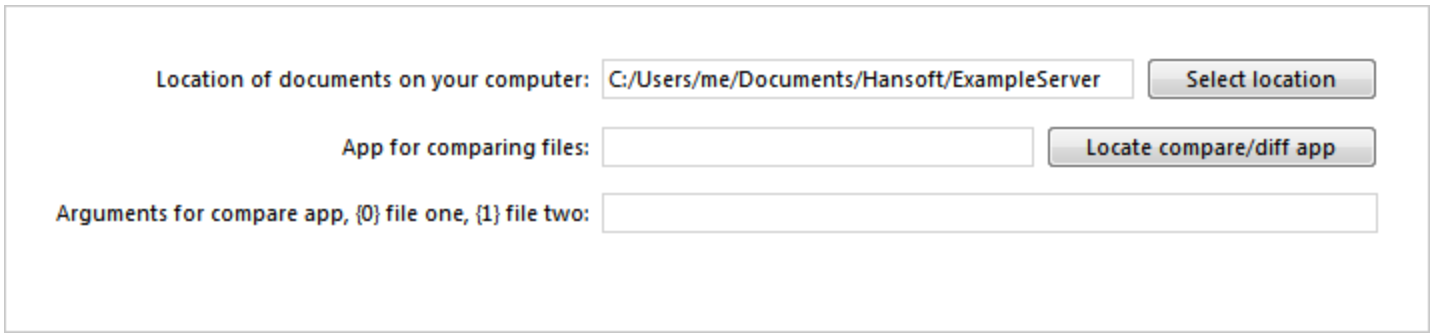
"Agile and Scheduling" provide options for both the Scheduling and Agile modes.

"Highlight tasks on Critical path" will highlight tasks in the timeline that if delayed will affect the finishing date of other tasks.



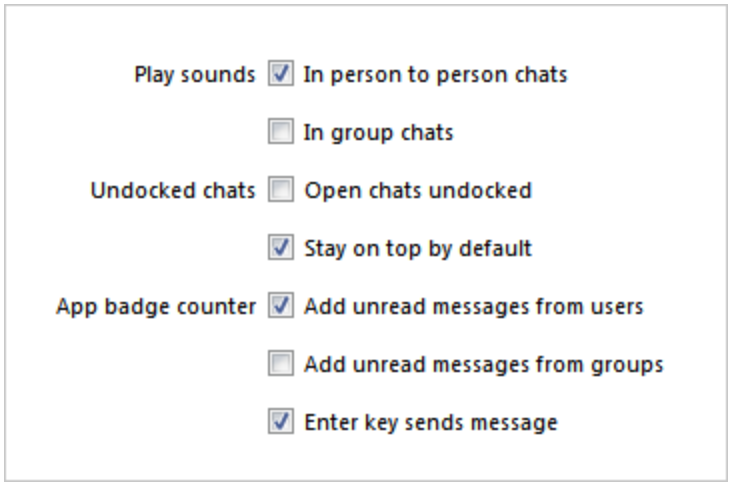
Note that in the timeline the shaded areas signify weekends, which is why "Ex Task 1" and "Ex task 2" retain their critical dependency.

Documents


Location of documents on your computer:
C:/Users/me/Documents/Hansoft/ExampleServer
Select location
App for comparing files:
Locate compare/diff app
Arguments for compare app, {0} file one, {1} file two:

In "Documents", users can specify a location for the local copies of documents from the Hansoft server, as well as an application to used when comparing files.

Chat

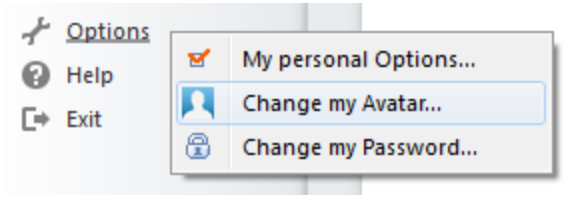


The "Chat" section includes preferences for sounds, badge counters, and how un-docked chats should behave.

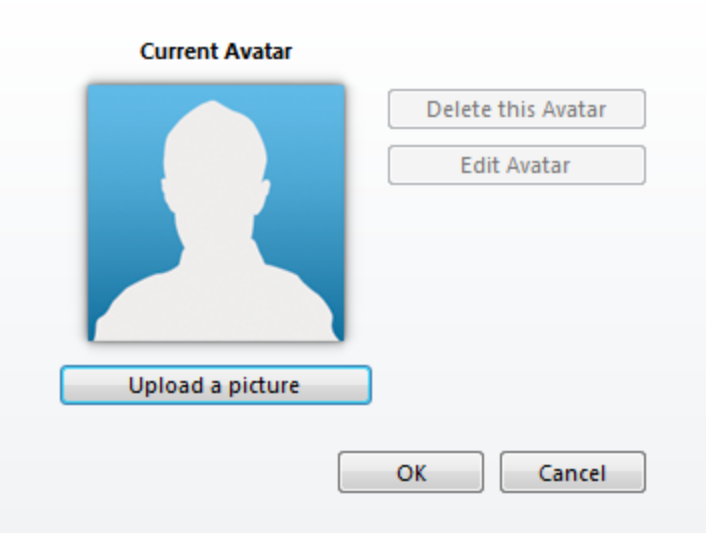
Setting an avatar

To make it easier to tell users apart, and add a bit of personal flair, users can be associated with an avatar, to be displayed in chats and news feed entries. This can be done either by the administrator, or, if given permission, by the users themselves.

Setting an avatar is done from the Options menu in the left-hand navigation pane.



The Options menu

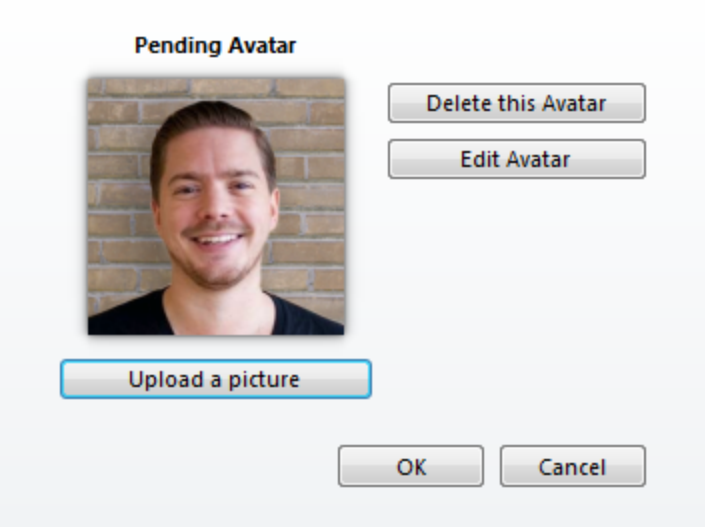


The Avatar dialog

Clicking **Upload a picture** will prompt the user for an image file from their local harddrive. It can be any size, and in any of the formats PNG, BMP, JPG and GIF.

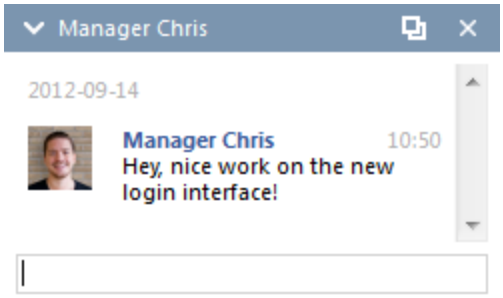
The cropping tool

Once uploaded, the image can be cropped (Avatar images have a 1:1 aspect ratio). This cropping is non-destructive, so the user can go back and choose a more suitable one even after the Avatar image has been saved.



The Avatar dialog after a successfully uploaded picture

After saving the Avatar, it will be used in various places, such as chat windows, user assignment dialogs and in News feed entries.

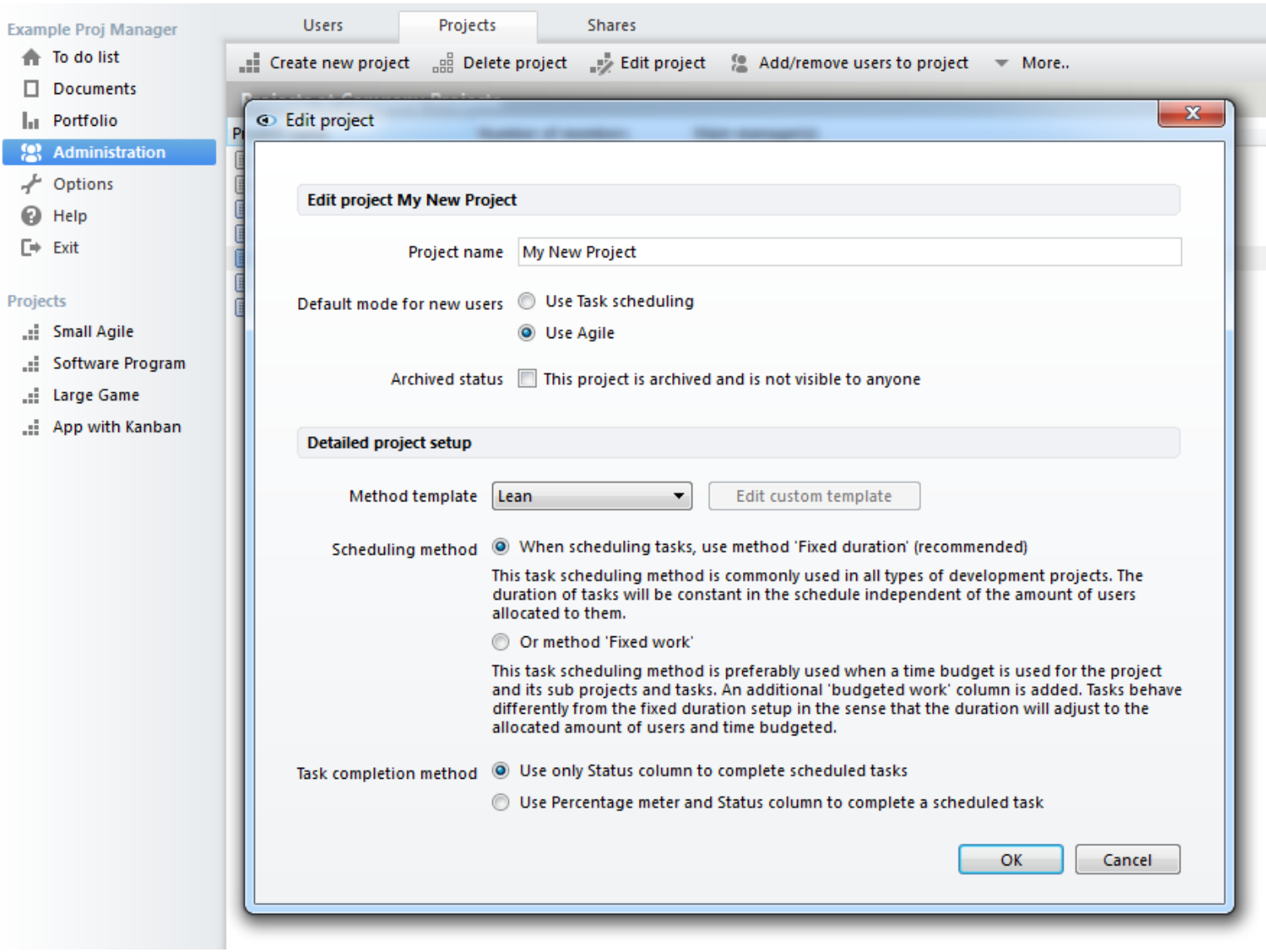


The Avatar in use

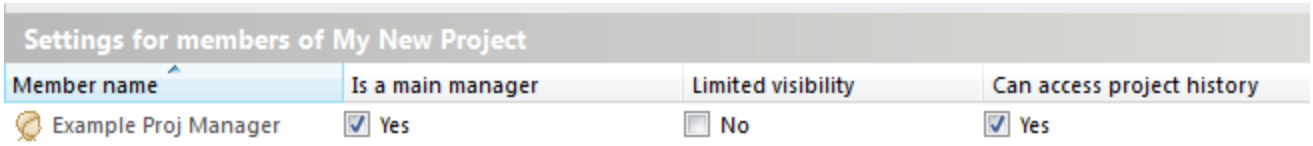
Import Microsoft Project data

1. Open Microsoft® Project 2003® or later and the project file. Select **Save As** and save the file in XML format (do not use export).

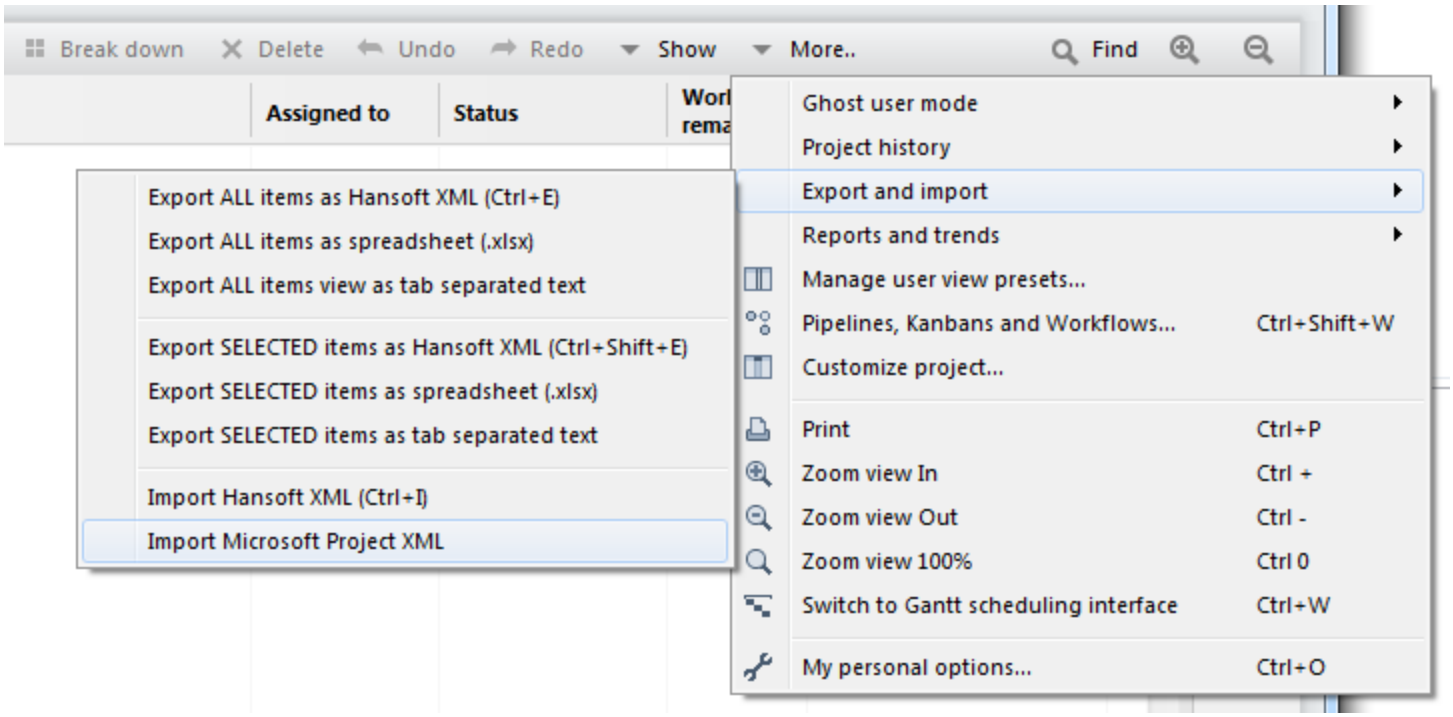
2. Open Hansoft and create a new project under **Administration>Projects>Create project**.


Example Proj Manager
To do list
Documents
Portfolio
Administration
Options
Help
Exit
Projects
Small Agile
Software Program
Large Game
App with Kanban
Users
Projects
Shares
Create new project
Delete project
Edit project
Add/remove users to project
More..
Edit project
Edit project My New Project
Project name
My New Project
Default mode for new users
Use Task scheduling
Use Agile
Archived status
This project is archived and is not visible to anyone
Detailed project setup
Method template
Lean
Edit custom template
Scheduling method
When scheduling tasks, use method 'Fixed duration' (recommended)
This task scheduling method is commonly used in all types of development projects. The duration of tasks will be constant in the schedule independent of the amount of users allocated to them.
Or method 'Fixed work'
This task scheduling method is preferably used when a time budget is used for the project and its sub projects and tasks. An additional 'budgeted work' column is added. Tasks behave differently from the fixed duration setup in the sense that the duration will adjust to the allocated amount of users and time budgeted.
Task completion method
Use only Status column to complete scheduled tasks
Use Percentage meter and Status column to complete a scheduled task
OK
Cancel

3. Make yourself a main project manager by click on the **Is a main manager** checkbox in the bottom window:



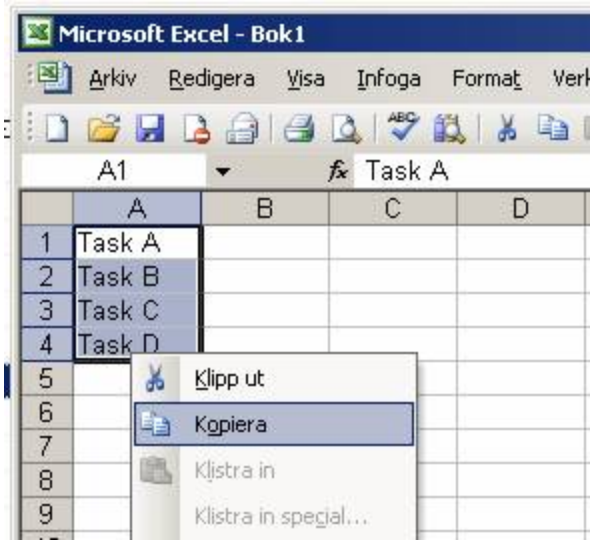
4. Go to the project you created. Press **More..** on the main toolbar, **Export and Import>Import Microsoft Project XML**.



5. Open the XML file you "Saved As" (not exported) from Microsoft® Project 2003®. Tasks and users will now be created.

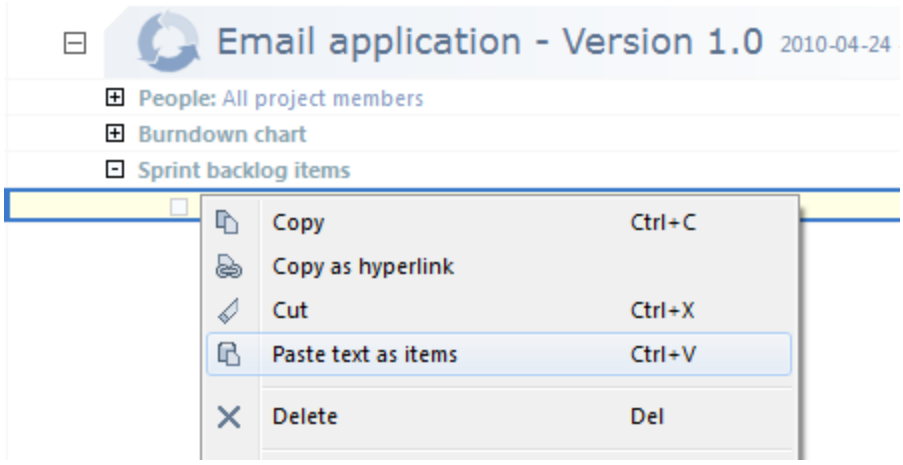
Paste as tasks / items / bugs from Windows clipboard

1. In Microsoft® Excel®, for example, write text within a couple of cells (this can be utilized within any program that has the capacity of copying text to the Windows® clipboard, Notepad for example).



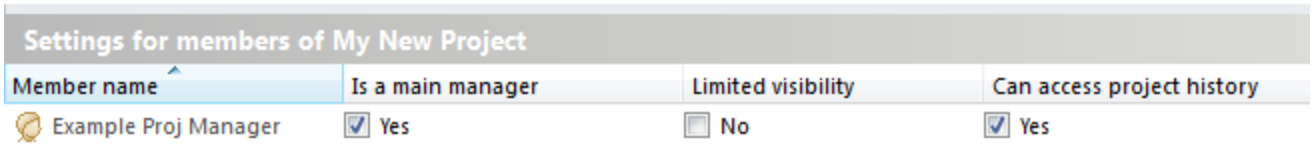
2. Select and copy the cells and text (keyboard shortcut Ctrl + C) on Windows and (Cmd + C)on OSX.

3. Open Hansoft and select **Paste as new items** (based on text clipboard):

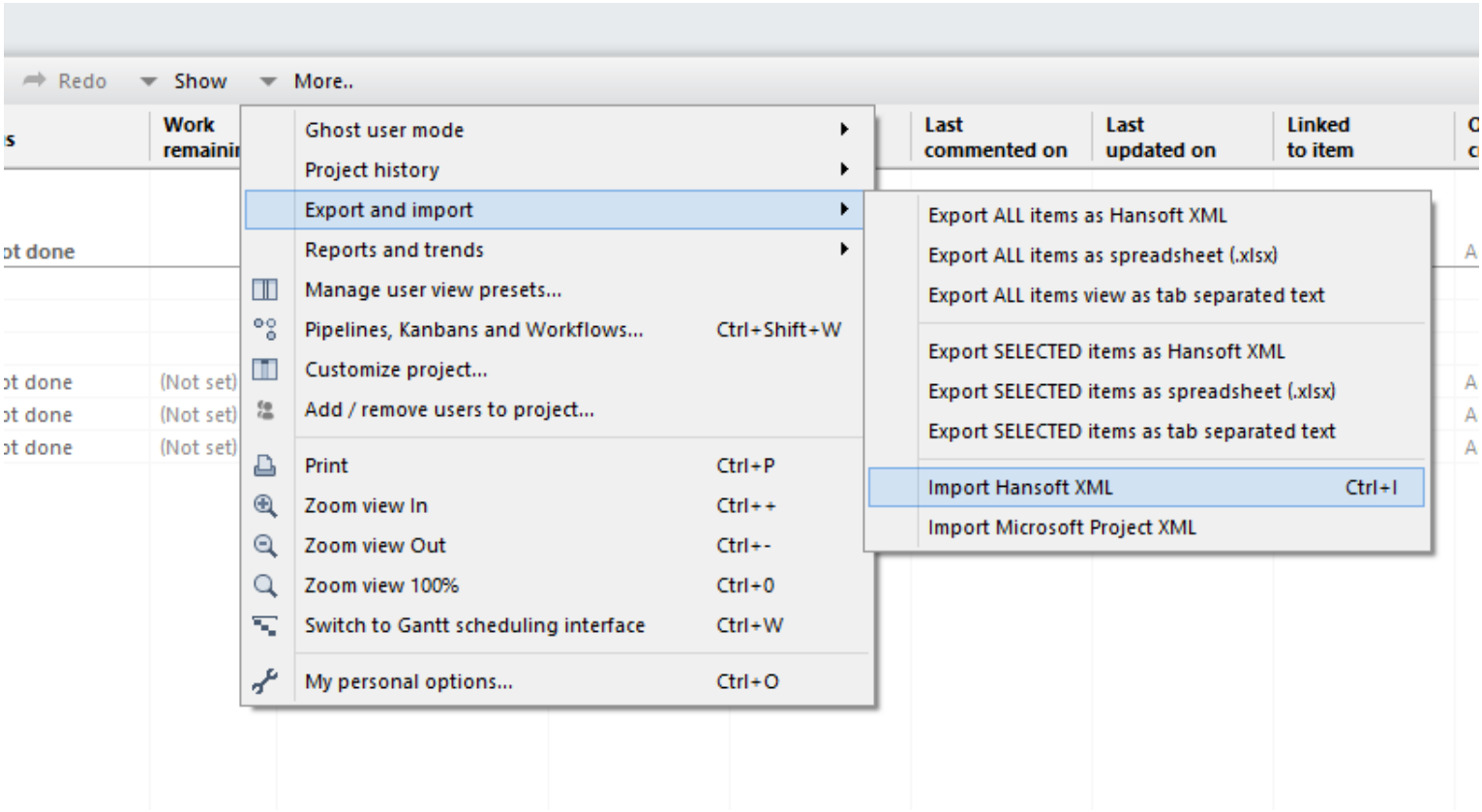


Import Hansoft XML data

1. Make yourself a main project manager by click on the **Is a main manager** checkbox in the bottom window:



2. Go to the project you created. Press **More..** on the main toolbar, **Export and Import>Import Hansoft XML**.

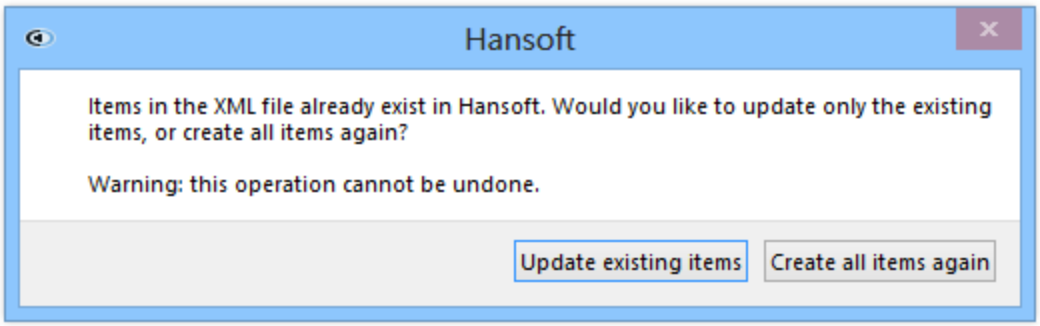


3. Open the XML file you "Saved As" (example name).

Tasks and users will now be created.

You can now select how you wish to proceed with the import.

Update existing items will not create any new items while **Create all items again** will only create new items. If you select **Create all items again** and attempt to import an item that already exists, a duplicate item will be created.


Hansoft
Items in the XML file already exist in Hansoft. Would you like to update only the existing items, or create all items again?
Warning: this operation cannot be undone.
Update existing items
Create all items again

Note: This dialog will only appear if you are attempting to import items that already exist in the target project

Note: An import will overwrite any currently existing data in Hansoft

Note: It is not possible to undo an import

It is preferable to select **Create all items again** in order to verify the integrity of the import. After this has been done you can delete the new items and import them again using **Update existing items**.

Data fields in Hansoft that are affected by "Update existing items"

- TaskName
- Completed
- PercentCompleted
- Work (-> Budgeted work)
- SetDurationHours
- StartHourOffset
- ColorR,ColorG,ColorB
- LockedToBeSubProject
- PreCreatedColumn_WorkRemaining
- PreCreatedColumn_Risk
- PreCreatedColumn_Effort
- PreCreatedColumn_Category
- PreCreatedColumn_ComplexityPoints
- PreCreatedColumn_ItemStatus

- PreCreatedColumn_SprintPriority
- PreCreatedColumn_MainBacklogPriority
- PreCreatedColumn_BugPriority
- VacationFlags
- QABugState
- QABugSeverity
- LongText
- SecondLongText
- FlaggedAsUserStory
- DateZones
- Resources
- MilestoneName
- ColorR,ColorG,ColorB (for milestones)
- Date (for milestones)
- Hyperlink
- GeneralLinkedTo
- CustomData
- CustomColumnDatas

Data fields in Hansoft that remain unaffected by "Update existing items"

- WorkflowStatusID
- WorkflowPipelineContainerID
- AutoGeneratedWorkflowPipelineContainerID
- AutoGeneratedWorkflowStatusID
- DefaultSubItemWorkflowID

- Linked to milestones
- Committed to sprint
- Scheduled connections
- DelegatedTo (security reasons)
- VisibleTo (security reasons)
- IDHistory
- Comments
- PlannedBy
- CommentPostings
- CCCommentsTo
- WallCustomGroupPosition
- ResourceUsage

Security

This is a page giving information about possible causes and solutions to the trust verification error displayed when connecting to a Hansoft server.

Troubleshooting

For help in addressing problems with connection security, proceed to the Troubleshooting section.

Information about certificates

You can read more about security in Hansoft in the Certificates section.

Certificates

Because the Hansoft client downloads executable code from the server, identity verification and trust play a key role in ensuring the integrity of communication.

Hansoft employs the industry standard AES-256 encryption algorithm for all communication between the client and the server. Additionally, from version 7.0, both client and server utilize X.509 certificate-based authentication and key exchange provided by the OpenSSL library.

This is done to protect clients from hacked servers, and to protect servers from clients running on unauthorized machines, minimizing security risks such as identity theft, eavesdropping and unauthorized access to sensitive information.

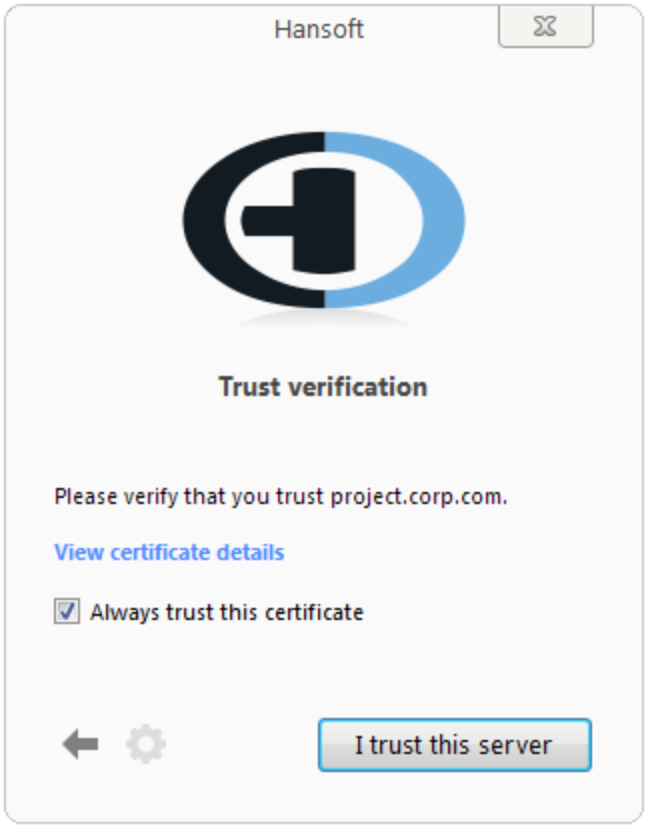
This product includes software developed by the OpenSSL Project for use in the OpenSSL Toolkit. (http://www.openssl.org/)

Certificates

In order to facilitate secure communication, the Hansoft server can be configured with a certificate issued from a Certificate Authority -- an entity in a chain of trust stemming from a number of established root authorities. By accepting the certificate, the user indicates that they trust the Certificate Authority, and therefore the server they are connecting to, and that the connection is allowed to continue.

In addition, servers can be self-signed, in which case a Certificate Authority is not involved. Upon connecting for the first time, the user will be notified of this.

Logging in to a secure server



The login screen prompting the user to verify trust of the server

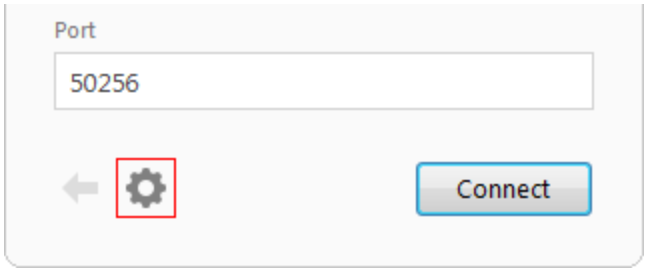
When first connecting to a server, the user is presented with a Trust verification dialog. Before accepting the certificate, the user may review the details by clicking the **View certificate details** link. If there are critical errors, these will be indicated. For more information about troubleshooting security, read the Troubleshooting section.

Trusting a certificate

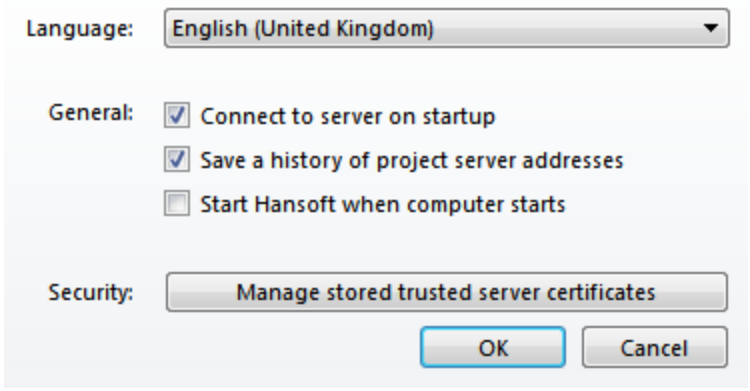
If the information provided in the certificate appears to be legitimate, the user accepts the connection, and proceeds to log in to the server. Certificates can be stored permanently by checking the Always trust this certificate checkbox. The server is now considered trusted by the client, and further notices will be suppressed as long as the certificate remains valid.

Removing a certificate

Should the user ever wish to rescind a certificate, the Connection options dialog contains a section for managing certificates.



The connection dialog

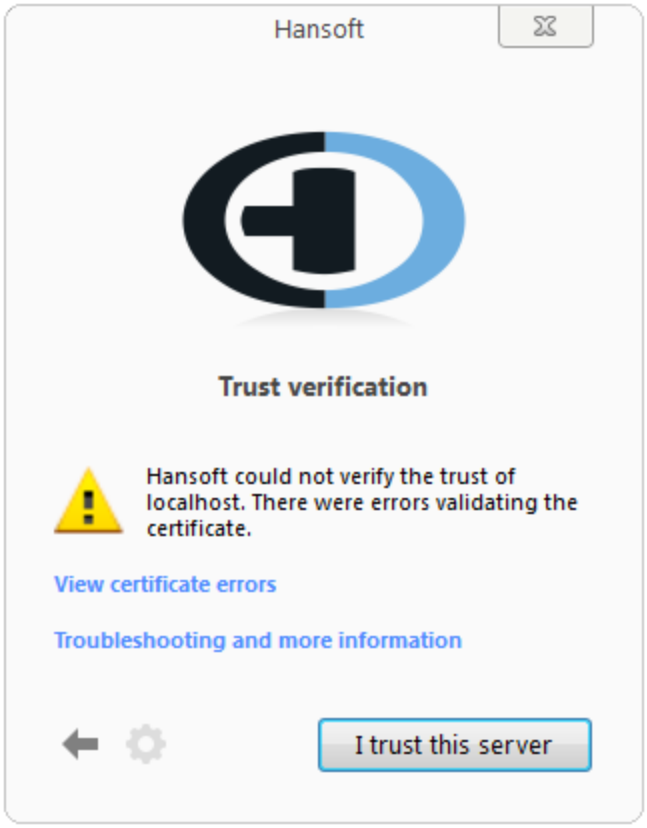


The connection options dialog

Clicking the **Manage stored trusted server certificates** button will display a list of certificates the user has previously trusted. By clicking Remove, the certificate is deleted, and upon the next connection, the user will again be asked to verify trust in the certificate.

The list of certificates

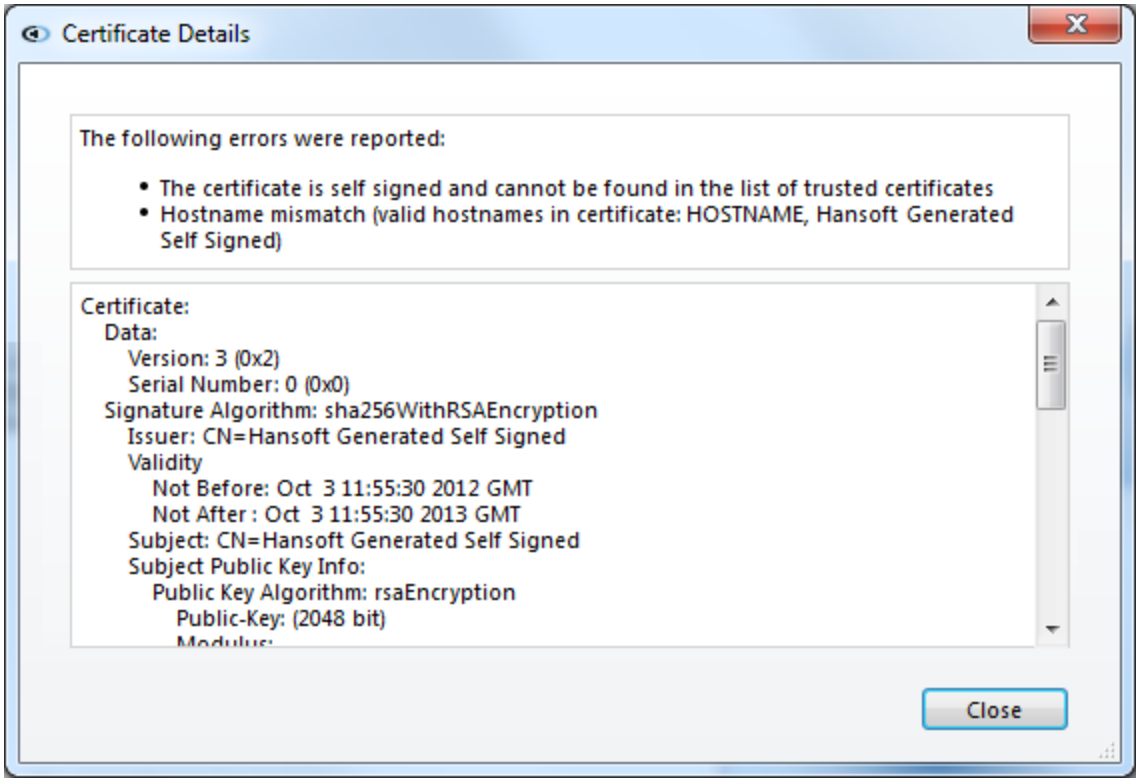
Troubleshooting


Hansoft
Trust verification
Hansoft could not verify the trust of localhost. There were errors validating the certificate.
View certificate errors
Troubleshooting and more information
I trust this server

Trust verification error dialog

When the trust verification dialog indicates an error, clicking the link will diplay the certificate details page. The top frame indicates the type of errors that were found. Read below for troubleshooting instructions on the most common errors.

Hostname mismatch


Certificate Details
The following errors were reported:
• The certificate is self signed and cannot be found in the list of trusted certificates
• Hostname mismatch (valid hostnames in certificate: HOSTNAME, Hansoft Generated Self Signed)
Certificate:
Data:
Version: 3 (0x2)
Serial Number: 0 (0x0)
Signature Algorithm: sha256WithRSAEncryption
Issuer: CN=Hansoft Generated Self Signed
Validity
Not Before: Oct 3 11:55:30 2012 GMT
Not After : Oct 3 11:55:30 2013 GMT
Subject: CN=Hansoft Generated Self Signed
Subject Public Key Info:
Public Key Algorithm: rsaEncryption
Public-Key: (2048 bit)
Close

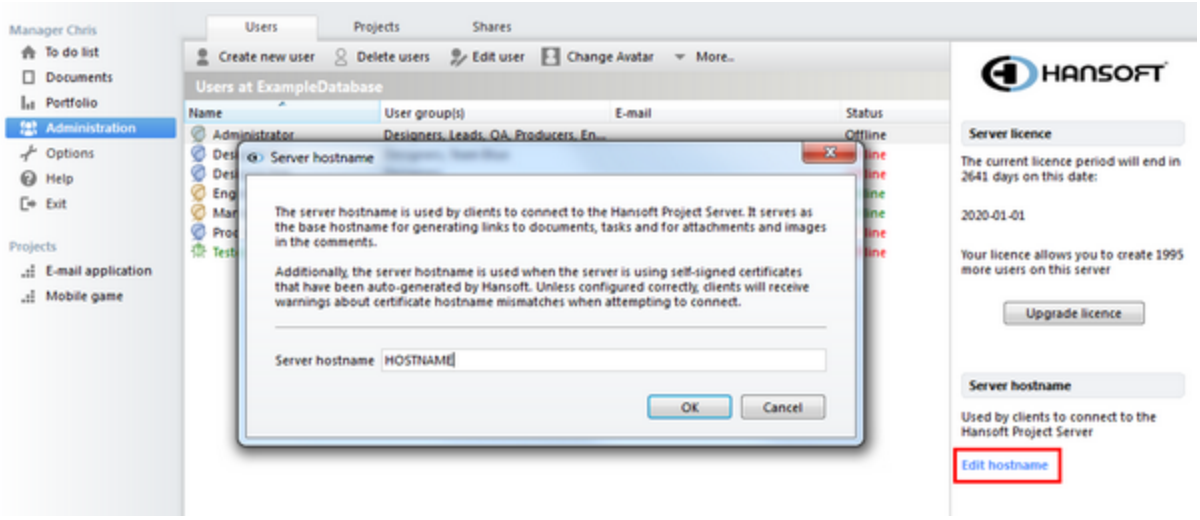
A hostname mismatch error

Trust verification validation errors usually occur because of hostname mismatches. Most commonly, the hostname in the certificate issued by the server is missing, or different, from the one that your client connected to. There may be several causes of this mismatch.

Server hostname is not specified, or is incorrect

Note: This has to be addressed by an Administrator

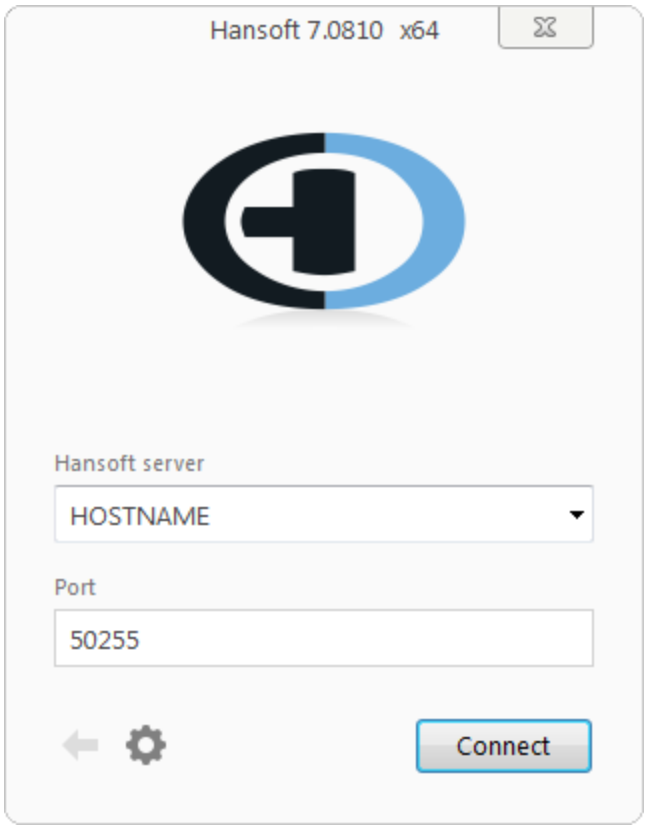
In the Administration sidepanel, click the Edit hostname link under the Server hostname section. Fill in the server hostname that your users would use to connect to the server. An example would be hansoft-server.mycompany.com.



Connecting to a server via the wrong hostname

For example, you might have specified your computer name (e.g. MYWORKSTATION) as the server hostname, but are trying to connect to localhost.

Solution: Make sure you are connecting to the same hostname as has been specified in the Server hostname field (as described in the section about Server hostname).



Hostname not found in certificate

Your system administrator may have provided Hansoft with certificates that do not contain the hostname you are attempting to connect to. The system administrator's guide provides further information on where Hansoft looks for hostname information in a certificate.

Compromised server

The server you are connecting to may not be what it says it is. Contact your system administrator, and verify the integrity of your Hansoft server.

Keyboard shortcuts

When editing text

When editing text in comments, user story, detailed description, steps to reproduce or a custom multi line column text you can use tags (such as <URL=www.hansoft.se>Hansoft</URL>). To save the change after editing tags, press Ctrl + S (⌘ + S).

To insert a tab in the text, press Ctrl + Tab (⌘ + Tab).

To insert an image when editing comment text, press Ctrl + V (⌘ + V).

To insert and immediately edit an image when editing comment text, press Ctrl + Shift + V (⌘ + Shift + V).

List of keyboard shortcuts sorted by function

Ctrl + R	⌘ + R	Add more users to task
Ctrl + Shift + A	⌘ + Shift + A	Arrange selected tasks
Ctrl + Shift + Number 1-9	⌘ + Shift + Number 1-9	Arrange tasks by extra column 1-9 numeric
Ctrl + Left	⌘ + Left	Collapse all under sub project
Ctrl + Shift + L	⌘ + Shift + L	Connect items by number
Ctrl + Shift + T	⌘ + Shift + T	Connect selected
Ctrl + C	⌘ + C	Copy to clipboard
Ctrl + Shift + W	⌘ + Shift + W	Customize bug workflow (in QA view)
Ctrl + X	⌘ + X	Cut to clipboard
Ctrl + Shift + G	⌘ + Shift + G	Delegate sub project to
Ctrl + Shift + D	⌘ + Shift + D	Disconnect selected tasks
Ctrl + Right	⌘ + Right	Expand all under sub project
Ctrl + Shift + Q	⌘ + Shift + Q	Find bugs committed to this sprint
Ctrl + Shift + U	⌘ + Shift + U	Flag as user story

Ctrl + Shift + C	⌘ + Shift + C	Go to item in Board view
Ctrl + Shift + V	⌘ + Shift + V	Go to item in Priority view
Ctrl + G	⌘ + G	Go to item in planning view
Ctrl + Shift + X	⌘ + Shift + X	Go to item in Schedule view
Ctrl + I	⌘ + I	Import Hansoft XML
Tab	Tab	Indent selected items
Ctrl + N / Insert	⌘ + N	Insert new item
Ctrl + M	Ctrl + M	Insert release
Ctrl + U	⌘ + U	Insert scheduled sub project
Ctrl + Shift + B	⌘ + Shift + B	Link to items
Ctrl + Shift + Home	⌘ + Shift + Home	Move connected items as far back as possible
Ctrl + Shift + Up / Down (Alt Gr + Up / Down)	⌘ + Shift + Up / Down	Move items/tasks vertically
Ctrl + D	⌘ + D	Open backlog
Ctrl + Shift + R	⌘ + Shift + R	Open reports dialog
Shift + Tab	⌘ + Tab	Outdent selected items
Ctrl + V	⌘ + V	Paste from clipboard
Ctrl + Shift + W	⌘ + Shift + W	Pipelines, kanbans and workflows
Ctrl + P	⌘ + P	Print
Ctrl + Y	⌘ + Y	Redo
Ctrl + Enter	⌘ + Enter	Reply to/post reply comment
Ctrl + K	⌘ + K	Save schedule in project history
Ctrl + Shift + M	⌘ + Shift + M	Screenshot tool (in QA view)
Ctrl + A	⌘ + A	Select all items
Ctrl + Shift + H	⌘ + Shift + H	Set hyperlink on selected items
Ctrl + S	⌘ + S	Show task in timeline view
Ctrl + T	⌘ + T	Sort selected tasks by start date
Ctrl + Number 1-9	⌘ + Number 1-9	Sort tasks by extra column 1-9 numeric
Ctrl + W	⌘ + W	Switch between agile and gantt scheduling interface
Ctrl + Shift + P	⌘ + Shift + P	Tag to multiple releases
Ctrl + L	⌘ + L	Tag to nearest release
Ctrl + F	⌘ + F	Toggle find window
Ctrl + Shift + O	⌘ + Shift + O	Toggle ghost user mode
Ctrl + Z	⌘ + Z	Undo
Ctrl + Shift + I	⌘ + Shift + I	View change history
Ctrl + O	⌘ + O	View options
Ctrl + J	⌘ + J	View project history
Ctrl + Shift + S	⌘ + Shift + S	View selected items only
Ctrl + 0	⌘ + 0	Zoom view 100%
Ctrl + Plus	⌘ + Plus	Zoom view in
Ctrl + Minus	⌘ + Minus	Zoom view out

List of keyboard shortcuts sorted by keyboard key

Alt Gr + up/down		Move items/tasks vertically
Ctrl +	⌘ +	Expand all under sub project
Ctrl+Enter	⌘ + Enter	Reply to/post reply comment
Ctrl +	⌘ +	Collapse all under sub project
Ctrl + Shift + up/down	⌘ + Shift + up/down	Move items/tasks vertically
Ctrl + A	⌘ + A	Select all activities
Ctrl + C	⌘ + C	Copy to clipboard
Ctrl + D	⌘ + D	Open backlog
Ctrl + F	⌘ + F	Switch find window
Ctrl + G	⌘ + G	Go to task/item in planning view
Ctrl + I	⌘ + I	Import Hansoft XML
Ctrl + J	⌘ + J	View project history
Ctrl + K	⌘ + K	Save schedule in project history
Ctrl + L	⌘ + L	Link tasks to nearest release
Ctrl + M	Ctrl + M	Insert release
Ctrl + N / Insert	⌘ + N / Insert	Insert new activity/item
Ctrl + Number 1-9	⌘ + Number 1-9	Sort extra column 1-9 numeric
Ctrl + O	⌘ + O	View options
Ctrl + P	⌘ + P	Print
Ctrl + Q	⌘ + Q	Move selected items to current sprint or backlog
Ctrl + R	⌘ + R	Add more users to activity
Ctrl + S	⌘ + S	Show activity in timescale view
Ctrl + Shift + A	⌘ + Shift + A	Arrange selected tasks
Ctrl + Shift + B	⌘ + Shift + B	Link to task/item/bug
Ctrl + Shift + C	⌘ + Shift + C	Go to item in Board view
Ctrl + Shift + D	⌘ + Shift + D	Disconnect
Ctrl + Shift + G	⌘ + Shift + G	Delegate sub project to..
Ctrl + Shift + H	⌘ + Shift + H	Set hyperlink on selected
Ctrl + Shift + Number 1-9	⌘ + Shift + Number 1-9	Arrange extra column 1-9 numeric
Ctrl + Shift + O	⌘ + Shift + O	Toggle ghost user mode
Ctrl + Shift + P	⌘ + Shift + P	Link to multiple releases
Ctrl + Shift + R	⌘ + Shift + R	Open reports dialog
Ctrl + Shift + S	⌘ + Shift + S	View selected only
Ctrl + Shift + T	⌘ + Shift + T	Connect selected
Ctrl + Shift + V	⌘ + Shift + V	Go to item in Priority view
Ctrl + Shift + X	⌘ + Shift + X	Go to item in Hierarchy view
Ctrl + T	⌘ + T	Sort selected by start date
Ctrl + U	⌘ + U	Insert scheduled sub project
Ctrl + V	⌘ + V	Paste to clipboard
Ctrl + W	⌘ + W	Switch between agile and task scheduling inter-

		face
Ctrl + X	⌘ + X	Cut to clipboard
Ctrl + Y	⌘ + Y	Redo
Ctrl + Z	⌘ + Z	Undo
Tab	Tab	Indent selected activities